**YGT episode 243**

You're listening to, you've got this episode number 240. Welcome to you. You've got this, a weekly podcast for higher education professionals looking to increase their confidence and capacity for juggling the day-to-day demands of an academic life. I'm your host, Dr. Katie Linder on this episode, I want to talk a little bit about how I am using click up for my weekly planning.

Now I checked in about four months ago, I think to share that I have switched over from notion to a platform called. Click up. And I will link to that episode in the show notes, that talks a little bit about why, but a primary reason is because click up is list-based and it helps me to kind of keep track of all the information that I need on a regular basis.

But there are specific things I'm using within click up when I'm planning out each week. And it's been helpful. I think for me to talk about this with some people who are interested in click up, like some of my coaching clients. Yeah. Because when you first get into click up, it can feel a little bit overwhelming, just like any platform, like notion or Trello or Asana, how you're kind of building out these systems for yourself.

So I thought it might be useful if I shared a little bit about the main things I'm using and click up. Now, the other thing that I think is useful to know is I feel like I'm using. Maybe 10 or 15% of what click up could do. So I don't consider myself a power user at all, but I still find it to be really useful for me, as I'm thinking through particularly weekly planning and maybe some long-term planning.

So the main thing to know about click up is I have a series of spaces and folders that houses a bunch of different lists. And these are all categorized in very different ways. But for tasks that I have on these lists that are specific, um, to do items that are about like deadlines that I need to check off my list, I put everything that has a deadline with a deadline, and that allows me to see it.

In a number of different views that I can filter. So the reason I differentiate between that is because I also have lists in click up. For example, I keep my coaching log in there and I don't have deadlines connected to my coaching log. It's just a list of people that I'm currently working with. And it tells me, you know, how many sessions they have left and things like that.

So I have certain lists that I'm keeping that are not deadlines specific. And then I have other lists that I'm keeping that are telling me like specific tasks that I need to complete on a project by a certain date. Now in the general kind of, um, overview area within click up, you have this option of, uh, there's a kind of everything space.

It's just kind of a default option. That's within click up. And I click into that every day. That's kind of what I look at on a regular basis. And I have that set up. There's a number of different views. So you can have a list view. You can have a calendar view, there's a bunch of different options of what you can do.

And what I've done is I've filtered that list so that I have, um, everything that is coming up in the next week. And it's basically just a vertical list, so it'll have Monday and then it will have all my tasks. For Monday and then there's Tuesday and it will have all my tasks for Tuesday. And then as I go through the week, it kind of refreshes and adds one more day at the very end.

Uh, as I close out one day, another day gets added. So what's interesting about this. Um, review is there's a couple things that I've built in that I found really helpful. One is I have some recurring tasks that I do every day. And as soon as I check it off on one day, it automatically jumps to the next day.

So I know that I have those things and these are really tied to primarily like my morning routine or certain things that I'm trying to make sure that I just don't lose track of like meditation throughout the day. Sometimes these things just kind of slipped my mind cause I'm busy or I have a lot going on.

So by putting them on my list, I can really kind of schedule in when I think they're going to happen. Now, the other thing that I've done is as part of my weekly kind of setup is I go in on a Sunday night or a Monday, and I actually layer in all of the meetings from my calendar. Into these lists. And I do them by marking the time at which they're happening and the lists are organized chronologically.

So what it allows me to do is then move things around on my list so that I can see the exact order in which things are happening on any given day. And it also kind of forces me a little bit to look at my calendar and to say, well, where are the gaps in my calendar on any given day where I might be able to do some of these tasks that I've assigned myself?

Now sometimes I'll look at my calendar and I have back-to-back meetings. And once I add everything into the list for that day, I'll go back and say, well, You know, there are some tasks today that I assigned myself, but now that I have all these meetings, I'm not going to be able to do these tasks. So then I might look forward in my week and reassign myself, those tasks at different points in the week, based on other gaps that I might have in my calendar.

This is a constant process. This is not something that like I do on a Monday, and then it's completely planned for the week and I never make any changes. I'm kind of in this list view pretty much all day. It's basically how I'm managing. Um, between like looking at my calendar and looking at this list view, it's how I'm kind of managing my time throughout the day.

So this is kind of the primary component that I'm looking at on a weekly basis and on a daily basis to make sure that I'm kind of keeping on track with the things I want to move forward, but there are two other areas of click up that I've also found to be really helpful. So I want to talk about those as well.

One of them is this dashboard that I've set up for myself and you have the option and click up of creating dashboards and they give you a bunch of widgets that you can add into these dashboards. I've primarily used. Text-based widgets of basically just little text boxes that I can then input information into each one and kind of set them up in different blocks.

So it's kind of easy for me to see a lot of information at one time. So currently in my dashboard on click up, I have a section for my 20, 21 goals where I'm kind of tracking certain things like the number of books that I'm reading, the number of coaching hours I've completed. Um, the number of hours that I've taught yoga, some metrics around the business revenue, things like that.

And then I have a list that is current focus or on deck. And these are the kinds of projects that I'm focused on right now. I'm currently working on them. So some of the things that are on this list for me right now is I have a meditation, white yoga teacher training. YTT that I'm taking. I have a change management certificate that I'm working toward.

I've talked about these things on the show in the past. I have a couple of coach training classes that I'm teaching and I'm trying to work my way toward. My next, um, yoga teaching credential. So these are things that are kind of top of mind that I want to make sure that I'm focused on. I also have a list of my current guiding values and I have a section that's called vision and I focused on like, what am I building toward in my vision?

And so I have a list of things there for just to kind of keep them top of mind for me. And I have a monthly milestones area. And this allows me to think of like the bigger things that are happening in a particular month that I need to be focused on. So as I'm recording this, for example, in the month of June, Coach training.

And my virtual writing group both have launches this month and I'm trying to complete my meditation, yoga teacher training. So, so those are kind of the big things that are happening in June. I have an area in my dashboard that is focused on what I call my professional development portfolio. And this allows me to take lists and see the progress through like a progress bar of how far along I am on certain kinds of professional development that I'm working towards.

So. Um, my meditation yoga teacher training, is there some things around, um, credentials that I need to recertify or there allows me to kind of see all that in one space. And then I also have a future project ideas area that I can kind of jot down ideas as they come to me. And I've also broken down my goals into specific chunks of, of kind of.

Themes so that I can be looking at my goals over a multi-year period. Now this is probably sounding kind of complicated, but I've built up this dashboard over a long period of time. So I have goals around yoga. I have goals around my business and career finance goals, coaching goals, and goals related to our house and our car.

And all of these things are allowing me to at a glance pretty much, you know, see this whole picture of what I'm working toward and how those things are tied in with my weekly planning, because I will look at this, um, also throughout the week and kind of see, are there things on here that don't feel aligned?

With what I'm spending my time and energy on in any given week or month. Now recently, click up also allowed you to create a widget that takes your goal metrics, which is another area of click up and embed that widget into, uh, your dashboard, uh, if you want to. And so I recently did that. So I'm also tracking goals in click up.

This is the third area I wanted to talk about, and basically you can tie a list into this area called goals, and then it will track the progress and you get a little. Um, like progress bar that tells you where you are with a particular goal. So for example, um, my reading goal, I'm 59% toward my reading goal of reading a hundred books for the year, because I've read 59 books so far.

And I have a little, um, progress bar that tells me that I have, you know, that, that that's where I'm at with that particular goal. So all of this is kind of combined into this dashboard area, which allows me, you know, at any given time to just do a quick review of how am I doing, what is my progress as I'm thinking toward these larger goals that I want to work toward.

No, I would say that I'm in this dashboard also daily, in addition to the, the list view that I mentioned earlier, but this is a dashboard that I look at probably the most, um, important time is around the month transition. When I'm also looking at something like my power sheets and trying to make sure that I'm basically on track with where I want to be with my annual goals and the biggest kind of benefit that I found from having these two views, the weekly list view, and then the dashboard overview that has my goals embedded in there is that I can really see at a glance if I'm getting off track or if I'm not aligned with where I want to be spending my time.

And what I want to be prioritizing. And this is really allowing me to be sure every week that I'm building in things that are helping me to make progress in these predetermined areas that my past self has kind of identified as being really important goal areas for me. Now, of course, I'm going to be revisiting my goals midway through the year out to be talking about that on the podcast.

Soon, I think that doing a mid-year check-in with goals is really important just to make sure that you're on track and that there's nothing you want to add or change. Um, but for now, this is really helping me with my weekly planning to make sure that, um, the little things that go into each day are adding up to the bigger goals that I really care about.

So I would love to hear if you have weekly planning, uh, that you are engaging with, and if you're using any kind of tools that are working well for you, you can always email me at hello at Dr. Katie linder.com. And I always love to hear about different tools and strategies you're using that. Make your planning more meaningful and purposeful.

Thanks for listening.

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