

Directions for using The Productivity Pro® DayTimer® System

Congratulations on purchasing The Productivity Pro® DayTimer®! No matter who you are, where you work, or how old you are, you have taken an important step toward organizing your life and improving your personal productivity. If you've never used a DayTimer® before or are switching lines to The Productivity Pro® planner, these instructions will show you how to take advantage of its unique features.

If you purchased the customized Productivity Pro® leather binder with your refill pages, you will find places to store your business cards, photos, travel cards, a pad of sticky notes for marking books, perhaps some coins, cash, note cards for writing letters, stamps, or anything you like to have on hand. Customize it for your personal needs.

To assemble The Productivity Pro® planner, open your leather binder and the rings. Place the pages in the following order:

PART I: Contact Information Page. Fill out all the requested information about how to get in touch with you. In case you should lose your binder and its precious contents, it can be returned. Determine what monetary reward you are willing to offer the finder of your lost binder—should that ever happen—to increase the odds of getting it back.

PART II: Monthly Calendar Tabs. Insert the entire year of 2-page-per-month calendar tabs next. These pages capture and coordinate all time commitments—personal and professional—in one place. Track ALL meetings, appointments, and obligations that must occur at a specific time on these tabs. Transfer information from multiple sources and throw or give away all other calendars, systems, and address books. It's important to have everything in a single place, so nothing falls through the cracks. The calendar pages are not intended to track things you need to DO on a certain date, just timed events. If you use a handheld for your calendar, use these tabs to outline a broad overview of your month.

Use the colored sticky dots in your refill to “code” certain activities during the month, tailored to your needs; for example:

RED = Stop. Don't schedule over this! Confirmed vacations, holidays, birthdays, etc.

BLUE = Caution. Might have a personal conflict that day.

YELLOW = Hold. Possible business meeting.

GREEN = Go. Confirmed client meeting, business trip or event.

Whenever you schedule a meeting or appointment, ask yourself “What will I need to do to prepare for this?” Write any tasks on the appropriate Daily Page.

PART III: Daily Pages. Locate the dated pages for the current month and place the pages behind the appropriate monthly tab. Keep one month of daily pages in your leather binder at one time. Keep the rest in your storage binder. As the end of the month nears, insert the next month. When all items have been finalized from the prior month, move them back to your storage binder. I keep three months of completed daily pages in my storage binder, but some people like to keep several years as a historical record. Do what makes you comfortable here.

Insert the TODAY page finder between today's daily pages. If you've used other DayTimer® products in the past, you'll notice the daily calendar has been removed from these pages to eliminate redundancy. No re-copying from the monthly calendar! And now you have more space to record your daily activities. On the right side of the page, record things you need to do that day. On the left side of the page, record calls to make and errands to run. If you don't finish a task, rewrite it on another daily page. Use notations in the √ column to track your progress:

√	Completed item
M	Message left but not returned
•	In-progress task
→	Task transferred to another day
X	Deleted item (don't erase)
Name	Delegated task (write first name)

When checking voicemail, record the name and number right into your planner. Do not grab a scrap of paper or a sticky note! If you need to do something that is further than 31 days out, use the back of a monthly calendar tab to record the tasks to accomplish that month. Be realistic about when you will get a task accomplished and schedule it for the correct day. Avoid rewriting multiple times; if you've moved a task forward more than three times, chances are you need to give it another week or two.

PART IV: A-Z Address Tabs. The A-Z tabs double as both an address book and a filing system. Use the front and back of the tabs to record names, phone numbers, email and physical addresses of your contacts. If you use your handheld or cell phone for business phone numbers, only record personal information on these tabs or use it for the filing system only.

The A-Z paper filing system allows you to use your blank Notes pages to track six main categories of information:

1. **Master lists:** great ideas that you aren't yet ready to schedule on a monthly or daily page, but you might do someday: furniture you might want to buy, projects you want to start, publicity ideas, website changes, research to conduct, etc. Best to separate into a business list and a personal list.
2. **Memory lists:** groceries, errands, gifts, vacation ideas, decorating, clothing sizes, books to read, movies to rent, restaurants, wines to try, babysitters, bus stop times, combination locks, websites
3. **Reference sheets:** birthdays, anniversaries, holidays, time zones, babysitters, neighbors, teachers, phone directories for associations, departments, or clubs
4. **Communication logs:** track points to cover or delegation items in your next conversation or meeting with a manager, subordinate, spouse, coworker, child, or client
5. **Projects and meetings:** blog posting ideas, kitchen redecorating, marketing initiatives, monthly newsletter, committees, taxes, meeting notes, etc.
6. **Planning calendars:** For planning future years.

Write the name of the list at the top of the Note page and file it behind the appropriate letter. There is no right or wrong way to title or file a Note page, as long as it makes sense to you. For example:

- Your Master Business List would be filed behind "M";
- The Birthday page would be filed behind "B";
- A Gift Ideas list for your spouse is behind "G,";
- Your assistant's name is Lisa, so you file your notes for your next conversation under "L";
- Blog ideas are under "B", etc.
- These Directions are filed under "D";

Your refill came with a package of Information Pages; separate them and file behind the appropriate alpha tab. Future planning calendars can be filed behind the last monthly calendar tab or behind "C" for calendars or "P" for planning. If you like typed lists, you can maintain them in a word processing document or Outlook Note. Load a blank page in your printer and specify your page size before printing.

As you can see, the goal is to customize Productivity Pro® planner to meet your specific needs and lifestyle. Day-Timer® has a wide variety of planner forms, accessories, storage solutions, organizers, and totes to help you tailor your system to your unique needs. Any Portable size products will work with your Productivity Pro® planning system.

Visit www.daytimer.com or call 800-225-5005 to order or request a catalog.
Visit www.TheProductivityPro.com for hundreds of articles on improving your personal productivity.