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BALANCE PLANNER MANUAL

HELLO & WELCOME

A message from our founder.

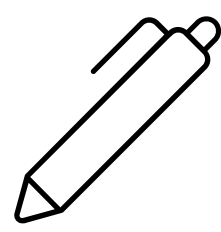
When we're busy, and the lines between work and home life become blurred, things can quickly become unbalanced. It's easily done. In fact, it's feeling like more and more of a challenge in today's working world. It's OK. I've been there - and I get it.

It's also why you're here, right? No problem. Over the following few pages, we'll show you how to get the best out of your Balance Planner - and your time.

So grab a pen, get comfortable
and let's get started.

Ollie

Founder of MindJournal



First things, first

We know you're excited to start, but before you do, head to the back of your Balance Planner to complete the toolkits.

Set a SMARTER goal, establish some healthy habits and create a self-care plan to get the most out of your first month. The following pages will guide you through each.

Ready? Let's go.

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Toolkit: Goal setting

Knowing how to set goals is an important skill. It encourages you to contemplate what you truly want out of life—but achieving your goals? Well, that’s a whole different ball game.

Science says that around 90% of people don’t achieve their goals. So what’s the secret sauce the other 10% are hiding? It’s simple: they understand the importance of effective goal setting.

Goal-setting is a productivity superpower used by everyone, from top CEOs to Olympic athletes. It helps you get clear on what you want to accomplish, why it’s important to you and, crucially, how you’re going to make it happen.

Before you start your first month, set one goal using the SMARTER framework. Then, you can pave a path to success through your monthly, weekly and daily views.

Want to learn more about SMARTER goal setting? Head over to our [blog](#).

Toolkit: Goal setting

Set goals that are specific, measurable, achievable, relevant, and timely. Then evaluate and readjust as needed. You can do this.

1

GOAL 3: WRITE YOUR GOAL BELOW S M A R T E R

GOAL SETTING

I'm going to earn a promotion and become a senior marketing specialist. I will do this by completing the level 3 course, taking on further responsibilities for a month, and requesting a review.

TIMELINE: Short (1-12 weeks) Medium (3-6 months) Long (6-12 months)

2

LIFE CATEGORY: PICK OR ADD YOUR OWN

Physical Professional Financial

Emotional Social Spiritual

3

MOTIVATION: WHY IS THIS GOAL IMPORTANT TO YOU?

Gaining this promotion will give me a strong sense of pride and accomplishment. It will allow me to gain the confidence to take my career to the next level for me and my family.

4

MILESTONES: LIST THE STEPS YOU NEED TO TAKE TO ACHIEVE YOUR GOAL

	KEY DATES:	
<i>Enroll on level 3 course</i>	<i>01.07.22</i>	<input checked="" type="checkbox"/>
<i>Complete level 3 course</i>	<i>26.07.22</i>	<input checked="" type="checkbox"/>
<i>Meeting with Tim to discuss extra responsibilities</i>	<i>09.08.22</i>	<input type="checkbox"/>
<i>Book in review meeting</i>	<i>09.08.22</i>	<input type="checkbox"/>
<i>Complete month 1, track and evaluate progress</i>	<i>05.09.22</i>	<input type="checkbox"/>
<i>Complete month 2, track and evaluate progress</i>	<i>07.10.22</i>	<input type="checkbox"/>
<i>Complete month 3, track and evaluate progress</i>	<i>08.11.22</i>	<input type="checkbox"/>
<i>Review meeting & presentation</i>	<i>14.11.22</i>	<input type="checkbox"/>
<i>Promotion</i>	<i>14.11.22</i>	<input type="checkbox"/>

5

REWARD: DATE COMPLETED:

Break with family

234

6

1 Set a SMARTER goal and a timeline

Write down your goal and check if it meets the SMARTER framework criteria. Is it short, medium or long-term?

2 Pick your category

What life category does your goal fit into? It may fit into more than one. Is it physical, like training for a 10K or financial, like clearing your debt?

3 Motivation

Why this goal in particular? Maybe you're focusing on your health or want to gain more financial freedom.

4 Milestones and key dates

Achieving your goal might not happen overnight, but that's OK. Break it into manageable chunks. Small wins will help you achieve the big ones.

5 Reward

Often we go through life without ever stopping to celebrate our achievements. Here's your chance to change that. How will you reward yourself?

Toolkit: Habit tracker

The Balance Planner is all about maximising life's good bits. About paying attention to the things you want to - not just the stuff you have to. The same goes for your habits. While avoiding unhealthy ones is always a good idea, it's also powerful to identify the positive behaviours you want in your daily or weekly routines. That could be regular morning runs, journaling for at least 15 minutes daily or drinking more water. Simple everyday stuff that will inch you towards becoming the best version of yourself. If motivation is what gets you started, then habits keep you going.

The thing is, forming healthy habits that you can stick with takes time. And while you wait for the positive effects of these new lifestyle choices to kick in, it's good to get some immediate feedback. After all, how else will you know if you're on the right path or not?

That's where the habit tracker comes in. For your first month, choose a handful of healthy habits you want to incorporate into your day. You can review these and update them if needed for months two and three.

1 Set your habits

Whether it's going to sleep earlier or restricting your screen time, write down the habits you are aiming for at the bottom of the tracker.

2 Track your progress

Add the days of the week along the top, and add a cross, tick or dot every day you achieve it.

If there are habits only applicable to work, or you don't need to do them daily, leave the square blank or cross it through to keep track.

2

DAY:	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	
HABIT:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29
<i>Meditate</i>	•	•	•	•	•	•	•	•	•	•	•	•	•	•															
<i>Workout</i>	•		•		•			•		•																			
<i>Walk @ lunch</i>	•		•	•	•	/	/	•	•	•			/	/															
<i>Finish @ 5pm</i>	•	•	•			/	/	•	•		•	•	/	/															
<i>Journal</i>	•		•		•		•		•		•		•																
<i>Asleep by 10pm</i>	•	•	•	•	•			•	•	•	•		•	•															
<i>Less screen time</i>	•	•	•	•	•			•	•	•	•		•																
<i>Read</i>	•	•	•			•	•	•	•	•	•		•																

1

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Toolkit: Self-care plan

Self-care tends to fall into six categories: physical, emotional, professional, social, financial and spiritual. And we need a good balance of all six to feel at our best.

Essentially, a self-care plan is the best way to make looking after yourself part of your routine. Sometimes we focus on some areas more than others, despite science suggesting they're all important. In fact, making balanced self-care a part of your life is known to reduce stress and the effects of burnout. It also helps you feel more in control of your circumstances so everyday life doesn't get too overwhelming. Life isn't just about work. Or at least, it shouldn't be.

Although there's no definitive list of self-care activities, the toolkit can help determine what works for your lifestyle. And if it enhances your physical, emotional and mental well-being, it counts.

Your self-care plan will feed into your month, week and daily views, allowing you to keep balance at the front of your mind.

Toolkit: Self-care plan

The self-care plan will show you the areas you are happy with and those you aren't. And then give you the tools to put yourself at the top of your list.

DATE:

SELF-CARE PLAN

1

Self-care scorecard: Evaluate your self-care.

1 2 3 4 5 6 7 8 9 10

PHYSICAL:

Consistent with working out, be more mindful with meal planning

EMOTIONAL:

Struggling with family time, feeling guilty and missing them

PROFESSIONAL:

Too comfortable, I'm ready to move to the next level

SOCIAL:

Have been finding a good balance, but need more consistency

FINANCIAL:

Pretty stable and slowly paying off debt. Keep going!

SPIRITUAL:

Waking up thinking about work, need to start my day differently

TOTAL: 32

AVERAGE: (TOTAL ÷ 6) 5.3

2

PICK THREE CATEGORIES TO FOCUS ON:

1. *Emotional*
2. *Professional*
3. *Spiritual*

SET THREE SELF-CARE ACTIVITIES TO DO:

1. *Spend more time with family*
2. *Complete level 3 course*
3. *Daily meditation*

3

4

BLOCKERS: WHAT'S STOPPING YOU

1. *Working too late*
2. *Procrastinating*
3. *Finding consistency difficult*

SOLUTIONS: WHAT WILL HELP YOU

1. *Finish at 5pm every day*
2. *Enroll today*
3. *Habit tracker & set time*

5

1 Self-care scorecard

Rate the six self-care categories out of 10 (1 being poor, ten being great). Then total them up and work out your average.

2 Focus categories

Next, highlight the three categories with the lowest scores. These are the ones to focus on and improve.

3 Self-care activities

Now list some activities that would support those areas. Some may cover more than one, e.g. a run with friends (physical and social).

4 Blockers

Is there anything getting in your way? Whether it's needing some new workout gear or finding someone to run with, write it down here.

5 Solutions

For every blocker, there will be a solution. Get those new trainers, and set up a running group chat to see who's interested in joining you.

Month view (left)

Zoom out and see the bigger picture. Plot your appointments, events and deadlines, and you'll immediately make sense of your time.

1
YEAR: 2022

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

Monthly calendar: If it's not on your calendar, it doesn't get done.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
4	5 <i>Course</i> 6-7pm	6	7	8 <i>Date night</i>
	✓			✓
11 <i>Dentist</i> 5.30pm	12 <i>Course</i> 6-7pm	13	14	15
✓	✓			
18	19 <i>Course</i> 6-7pm	20	21	22
	✓			
25	26 <i>Finish course</i>	27 <i>Meet up with Nick</i>	28	29
	✓	✓		
1	2	3	4	5

Tip: Use this section as a quick way to set your priorities for the next month. The key to a fulfilling life is not just achieving goals, but making space for activities that make you feel good and bring you closer to the people you care about.

2
3
4
5

1 Year, month and quarter

Add the year, month and quarter to help you track your progress. It will help you look back and see how far you've come.

2 Date

For each day, add the date in the grey box. Once achieved, completed or finished, check the smaller box bottom right.

3 Goals and milestones

Plan out significant goals or milestones in the monthly view. It will give you a snapshot of what you're working towards.

4 Appointments, events and deadlines

Also include activities such as meetings, social events or work deadlines to keep you on top of the month ahead.

5 Top tips

You'll find guidance in these grey boxes throughout the Planner. This will help you if you're ever unsure of what to do.

Month view (right)

Plan your path for the month ahead. Focus on specific areas of self-care, achievable goals and tangible rewards to treat yourself.

QUARTER: Q1 Q2 **Q3** Q4

MONTH 1 / 3

SATURDAY	SUNDAY
9	10
16	17
23	24
30	31 <i>Theo's birthday</i>
6 <i>Dinner with Dad</i>	7

Monthly focus: Plan the month ahead.

WHAT AREAS DO YOU WANT TO FOCUS ON?

- Physical
- Emotional
- Professional
- Social
- Financial
- Spiritual

WHAT THREE GOALS/TASKS ARE YOU WORKING TOWARDS THIS MONTH?

1. *Balance of work/family time*
2. *Meditate every morning*
3. *Complete level 3 course*

WHY ARE THESE GOALS/TASKS IMPORTANT?

- Spending more time with Sam/kids*
- Clear head for the day*
- Moving towards a promotion*

WHAT WILL HELP YOU ACHIEVE THESE GOALS/TASKS?

- Finish work at 5pm*
- Use meditation app*
- Sticking to a set time for learning*

HOW WILL YOU REWARD YOURSELF?

- Weekend away with friends*

Life is long if you know how to use it.
Seneca

6

7

8

9

10

6 Focus areas

Complete a self-care toolkit before you get started. It will help you narrow down your focus areas.

7 Goals and tasks

Now get specific with your goals. This could be completing a course to further your career or spending more time with loved ones.

8 Why are they important to you?

By writing down why they matter to you, you'll find motivation to keep on track and achieve them.

9 What will help you achieve them?

It could be something small like working no later than 5 pm or having dedicated time each week for learning.

10 Decide how you will reward yourself

Adding a reward can help to keep you motivated. Treat yourself, whether that's a meal at your favourite restaurant or a day out with friends. Whatever brings you joy.

Week view (left)

Tailor-made for short-term planning, this view gives you a heads-up on the next seven days, outlining your intentions and getting ahead of your tasks.

1
WEEK OF: 25.07.22

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

Weekly preview: What are you focusing on this week?

MONDAY:	/		<i>Meditate</i>	✓
			<i>Workout</i>	□
FOCUS:	<i>Review supplier quotes</i>	✓	<i>Cook dinner</i>	✓

TUESDAY:	<i>Course 6-7</i>		<i>Meditate</i>	✓
			<i>Shortlist interviews</i>	✓
FOCUS:	<i>Assistant interviews</i>	✓	<i>Book Lola's club</i>	✓

WEDNESDAY:	<i>Meet up with Nick</i>		<i>Meditate</i>	✓
			<i>Workout</i>	✓
FOCUS:	<i>Team meeting - Q4</i>	✓	<i>Family time</i>	✓

THURSDAY:	/		<i>Meditate</i>	✓
			<i>Course tasks</i>	✓
FOCUS:	<i>Directors meeting</i>	✓	<i>Call Tom for catch-up</i>	□

FRIDAY:	<i>Date night - 7.30pm</i>		<i>Meditate</i>	✓
			<i>Finish work at 5pm</i>	✓
FOCUS:	<i>Admin catch-up</i>	✓	<i>Pick up dinner</i>	✓

SATURDAY:	<i>Time at home</i>		<i>Haircut</i>	□
			<i>Bath</i>	✓
FOCUS:	<i>Rest</i>	✓	<i>Movie</i>	✓

SUNDAY:	<i>Theo's birthday</i>		<i>Family time</i>	✓
			<i>Book trip</i>	✓
FOCUS:	<i>Theo</i>	✓	<i>Early night</i>	✓

1 Week and month

Add the week commencing date and then circle the month. Making a note will allow you to keep all your views in sync.

2 Appointments, events and deadlines

Pull these through from your monthly view. Nothing in for that day? Just leave it blank or strike it through.

3 Focus

What's your main focus for the day? It could be making progress towards a goal or deadline, finishing a task or even getting outside.

4 Three key tasks or priorities

After your main focus, use this area to prioritise three other non-negotiables in your day. These could be tasks for work, self-care activities or a blend of both. Use this space to keep track of things that support your focus areas or something else important to you—trying to be mindful of eating well? Pop your main meals in here.

Week view (right)

At the end of the week, reflect on how you feel it went. Achievements, delays, how you spent your time. It's all important and part of the process.

RATE YOUR WEEK:

1 2 3 4 5 6 7 **8** 9 10

WEEK 3 / 12

5

Weekly reflection: What did you achieve this week?

6

WHAT DID YOU LEARN THIS WEEK?

Impact of daily meditation
Importance of 1-1 time
How to achieve more balance

YOUR THREE WINS:

1. *Quality time with Sam*
 2. *Finished course!*
 3. *Theo's birthday*

7

REVIEW TASKS LIST: WHAT TASKS WERE DELAYED?

1. *Call Tom for a catch-up*
 2. *Completion of digital project*
 3. *Haircut*
 4.
 5.

BLOCKERS:

Lola poorly
Tech issues
Cancelled

RESCHEDULED:

12.08.22 ✓
10.08.22 ✓
06.08.22 ✓

8

REVIEW YOUR TIME TRACKER: HOW DID YOU SPEND YOUR TIME THIS WEEK? HOW COULD YOU IMPROVE NEXT WEEK?

Tasks: *Made a lot of progress with time blocking - keep doing this*

Distractions: *Social media - set screen time limit*

Self-care: *1/2 workouts - add in shorter session on busy days*

9

NOTES:

.

5 Rate your week

Score your week out of ten. By doing this, you will start to notice patterns in how you spend your time versus how you feel.

6 What did you learn this week?

What were the takeaways from the week? Maybe daily meditation gave you a boost, or social media became too distracting.

7 Your three wins

List three things that went well. Beat your personal best in a park run, or finally catch up with that friend? Write them down.

8 Review your tasks list and blockers

Now list any tasks you couldn't complete and why. Was an appointment cancelled, or you ran out of time? No problem, just reschedule.

9 Review your time tracker

Look at your daily time trackers and record how much of the week you spent working, getting distracted and looking after yourself.

Day view (left)

Schedule to-dos and self-care activities. The day view keeps you mindful of high-priority tasks whilst also keeping balance front of mind.

DATE: 27.07.22 MON TUE **WED** THU FRI SAT SUN

You will never find time for anything. If you want it, you must make it. Charles Buxton

1 HOW COULD YOU ACHIEVE BALANCE TODAY?

Finish work at 5pm, take regular breaks and stick to time blocking.

KEY MOTIVATORS:

1. *Finish key tasks*
2. *Put the kids to bed*
3. *Get an early night*

3 PRIORITIES: TIME BLOCK

	HRS/MINS
1. <i>Team meeting - Q4 focus</i>	✓ 2 : 0
2. <i>Project proposal for Tim</i>	✓ 2 : 0
3. <i>Budget review</i>	✓ 1 : 0

2

4 TASKS:

SCHEDULE: Done Delay Delete

6-7	<i>Workout</i>	✓
7-7.15	<i>Meditate</i>	✓
8.30	<i>Drop kids off</i>	✓
9-9.30	<i>Admin & emails</i>	✓
9.30-10	<i>Call with Andy</i>	✗
10-12	<i>Team meeting</i>	✓
12-1	<i>Walk & lunch</i>	✓
1-3	<i>Project proposal</i>	✓
3-4	<i>Budget review</i>	✓
5.30-7	<i>Family time</i>	✓
7-9	<i>Meet-up with Nick</i>	✓
9.30-10	<i>Journal</i>	✓

SELF-CARE PLAN:

Physical Financial

Emotional Spiritual

Professional

Social

ACTIVITY: HRS/MINS

<i>Workout</i>	✓ 1 : 0
<i>Meditate</i>	✓ : 15
<i>Meet-up with Nick</i>	✓ 2 : 0
<i>Journal before bed</i>	✓ : 30

45

1 Achieve balance

Think about what you could do today to restore the balance between home and work. Commit to finishing work on time or taking regular breaks.

2 Key motivators

What things might encourage you to achieve some balance? For example, finishing work at five could mean more time with loved ones.

3 Time block

List high-priority tasks and allocate time for them. This could be deep-focus work, deadlines or anything else that needs no interruptions.

4 Tasks

Use this section to schedule your day or write a to-do list. Did it get done, delayed or deleted? Use the box to keep a record.

5 Self-care plan

When planning your month, what areas did you focus on? Ensure that you choose self-care activities that support your plan from the toolkit.

Day view (right)

Take time to check-in with how you are feeling. Then, review the time you've spent working, looking after yourself or becoming distracted.

MOOD TRACKER:

1 2 3 4 5 6 **7** 8 9 10

DAY 18 / 90

6

7

NOTES:

Team meeting:

*Send Sarah onboarding doc
 Move next meeting forward to 10th Aug
 Chase marketing company for quote
 Book in team day
 Digital project delayed 2 weeks*

$$26 \times 14 = 364$$

$$\begin{array}{r} 26 \\ \times 14 \\ \hline 104 \\ + 260 \\ \hline 364 \end{array}$$

*Phone Dad on Thursday
 Pick up present for Theo*

Set screen time limit

8

TIME TRACKER:

0 HRS 0.5 HRS 1 HRS 2 HRS 3 HRS 4 HRS 5 HRS 6 HRS 7 HRS 8 HRS+

Tasks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Distractions	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Self-care	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

6 Mood tracker

How would you rate your mood today? Be honest with yourself. This is just for you. Want to expand? Use out your MindJournal.

7 Notes

Use this space for notes throughout the day. Things to remember, doodles in that meeting, whatever you need.

8 Time tracker

Tracking your time is a powerful technique for organisation and productivity. Essentially, this simple routine gives you invaluable insight into how you're spending your days. Not only that, it keeps you on track with your goals and puts you back in control of your time.

Use the daily time tracker to record how long you've spent on tasks, self-care or getting distracted - there's no judgement here.

By reviewing your time at the end of each day, you'll be able to make incremental changes to get yourself back in balance, if needed.

**WE NEED TO DO
A BETTER JOB OF
PUTTING OURSELVES
HIGHER ON OUR OWN
'TO-DO' LIST.**

Michelle Obama

Your questions, answered

From winning combinations to your next steps, here are the answers to some of our most common FAQs.

Can I use the Balance Planner and the MindJournal, or MindJournal Pro together?

Absolutely. Designed to complement each other and fit seamlessly into your lifestyle, the MindJournal and the Balance Planner are a powerful combination.

For example, you could turn your answer to ‘Do you love what you do?’ from your MindJournal into actionable steps using the goals toolkit and through the view pages of the Balance Planner.

Or, after completing the stress bucket, you could ensure the tasks causing you stress are tackled as a priority, allowing your work and wellbeing to be in sync.

Want to give MindJournal a try? [Download the first three entries here.](#)

What do I do once I have completed the Balance Planner?

You've come this far, so why stop? This is just the start of getting your work and wellbeing in sync. Now you're in the swing of things, starting a fresh one will be even easier. The Balance Planner is the perfect way to keep your home and work life in harmony long into the future. So keep going, and plan your way to greatness.

Got a question?

Hopefully, by now, you've got everything you need to get started. But if not, please get in touch. We love hearing from our community and are always happy to help.

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