

## Ep #237: The 3 Month Plan



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**Angela Kelly**

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Hello empowered principals. Welcome to episode 237.

Welcome to *The Empowered Principal™ Podcast*, a not so typical educational resource that will teach you how to gain control of your career and get emotionally fit to lead your school and your life with joy by refining your most powerful tool, your mind. Here's your host certified life coach Angela Kelly Robeck.

Well hello my empowered leaders and Happy Tuesday. Welcome to the podcast. We're so happy to have you today. I'm going to dive right in. I am going to talk with you today about the three month plan. This is a process that I created for my one-on-one clients to help them always feel prepared, to always feel like they are ahead. Because one of the problems that I hear with every principal I work with is that they feel behind. They feel overwhelmed and they feel behind. They're always trying to catch up. They want to be ahead of themselves.

So I really thought about what's the best way, the easiest way, the fastest way to feel like you are ahead, to not feel behind, to not feel overwhelmed. That is to come up with a plan where you are working ahead in your future. You're taking care of problems ahead of time so that you have many less unexpected problems or things that come up that you haven't anticipated or don't have a solution to. Then you're backpedaling, and you're trying to figure things out in the moment and having to react instead of intentionally planning and acting.

So the reason I decided three months is that I was talking with a client of mine. She said, "You know planning out my whole year just felt too big. It felt too hard. It felt like it was too much to consider. It was too overwhelming. I wouldn't do it. It was not working effectively."

So I started thinking like what could we wrap our head around that would make it tangible, that would make it easier, that would make it

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manageable? 90 days feels manageable. It feels like it's something you can wrap your head around.

I love the idea of the three month plan because it breaks your year down into seasons. So you can think about the school year in terms of the seasons, right. You've got your fall season, winter, spring, summer. You can think about that in quarters if you want to. It helps the brain digest the school year and make it easier to be mindful and plan ahead in terms of what you want to accomplish in the next 90 days.

I know just for me when I say out loud 90 days, the three month plan is a 90 day plan. 90 days feels tangible and concrete. So that's how this really came to be. People were just feeling like there were so many new things. That planning out the full year was too far out, too many details to consider. That when they were planning for a full year, everything felt like a priority. When everything's a priority, nothing is a priority.

Then you can't decide where to focus. So you're doing the whack a mole approach. Like you're whacking this over here, then you're running over here and trying to solve this, and then you're coming over here and trying to solve that. You can't decide where to focus, right.

So this training is really for people who are new to the position and don't know what's happening. They don't know what they don't know. The overwhelm is real. If you don't have a lot of guidance, this three month plan will really help you ground yourself and feel established as a brand new leader.

This is also helpful if you want to establish true priorities and have a primary focus. I'm going to talk about having a primary focus. The word priority means one. So we're going to establish a primary focus that helps you not feel like everything is equally important. It helps you know what lens to run your work through. Okay.

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We also want to feel in control of how we're spending our time and energy. If the day feels like it's happening to you, if you're constantly feeling bombarded with interruptions, you're getting off track. People are talking your ear off then you're having to overwork in response to that, and you feel out of control with your time, the 90 day plan helps you feel in control. It helps you manage your time in a way that feels highly productive and provide you balance.

If you want to stop feeling like you're always behind and you want to start feeling like you're on top of things, that you have a plan. That you've identified potential obstacles or challenges, and you've identified a plan in advance for those challenges, you are going to feel so amazing as a school leader. Okay.

So what you're really looking for is to create a sense of calm and focus and trust in yourself and in others and in the process. Basically you just want to feel prepared. You want to go to bed at night knowing you're prepared for the next day. You want to know you have a plan in place. You want to know that you've thought through what's coming ahead for you, and that all of the things that need to be in place in order for that thing to be accomplished has been checked off the boxes.

The to-do list has been checked off. You want to make sure you've got time for your own self and your appointments and your fun and your family. You want to have all of it on the calendar. We're going to prioritize it using our primary focus. I've helped dozens and dozens of clients do this, and I'm going to help you do it too. Okay.

So here's what you walk away with. When you become a client of the Empowered Principal™, you're going to get the template. You're going to get weekly support and instruction on how to implement your 90 day plan and put it into a three month package that feels really tangible to you. Okay.

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So you're going to understand why taking time to do this and planning out your three months is the best use of your time. A lot of times the reason we don't slow down and plan is because we feel too busy to be able to slow down. But what we have to do is push pause, plan out the three months, plan out for those obstacles so that you can feel better knowing you have the plan.

So it's going to give you a step by step process of how to approach your job whether you're new and it's your very first year, or you've been doing this a while. If you feel an organized, you feel like next year I'm going to do better, and then next year, it feels the same as the year before. Like you can't figure out how to get into a rhythm. The three month plan is the solution.

It's going to give you a clear process. It's going to help you identify the things you need to consider and the pitfalls you need to avoid. The beautiful thing about the three month plan is that it makes you a more valuable school leader. You know what that means. When you're a more valuable school leader, you create more demand. When you create more demand, you make more money. I'm all about you being a highly valuable leader that's in high demand that makes top dollar for what you do. Okay.

So anybody can go out and get a calendar and map out their three month plan. They can look at the next three months and say what's coming up, write it all down, and then make a great big, huge to-do list. Anybody can go do that. But why this is different, it's that we are not attempting to do it all. We're not just looking ahead for the next three months and writing everything down and then going bonkers crazy trying to get it all done. We're not going to attempt to do it all.

We're going to prioritize. We're going to reject overwhelm as an option. It is no longer an option to be overwhelmed. We're going to cover the issues and challenges that come up. We're not going to let them be problems.

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We're going to problem solve ahead of time so that they're not becoming problems in the first place. We're going to process and practice making decisions quickly, swiftly, and clearly.

We're going to commit to prioritizing and making decisions because decisions are what generate actions, and actions are what generate results. The meter of success is how you feel. You want to feel prepared and planned. So we're going to measure your three month plan success by how you're feeling and how you're spending your time, which is not overworking, not playing whack-a-mole, not being constantly bombarded with interruptions. Okay.

So Let's dive in. What you want as a school leader is you want to feel on top of your game. You want to feel prepared. You want to know what's coming up. You want to understand your value as a leader. You want to always be adding value as a leader. You want clear priorities. You want time to consider the obstacles that you are going to be facing and problem solve them ahead of time.

You want to have a plan that's prioritized and efficient. Because when you have a plan, when you have thought out the three months that are in front of you, you don't have to go to bed at night worrying and waking up and wondering and thinking about did I miss something? Did I forget something? Did I remember to put that on my calendar? Did I remember to call this person? Did I remember me email this person?

When you have a plan and you plug those things into place, you're going to feel like you have built safety nets into your workday, your work week, your work year. Okay. This plan is going to take all of the realities of the job into consideration. So you're going to have the opportunity.

When you sit down and plan your three months out, you're going to say but look, this is the reality of the job. I get this many phone calls. I get this many

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parent meetings. I get this many IEP meetings. I get this many student referrals. I get this many newsletters I have to do. You're going to be able to write them all down. Okay.

I want to just say something here. The job will offer you 10 times more than you have time for. There will always be more to this job than you have time. I just want you to let that reality set in. You're not going to get to everything. You're not designed to. That's not the point. The point isn't to do everything.

I'm going to teach you some hacks and some tips and strategies for maximizing your effectiveness and being able to get more done in less time. But I just want you to also understand the goal isn't to do it all and to always be doing every little thing that the job offers. The job is going to offer a lot of distractions, a lot of interruptions, a lot of ways to get you off track from your plan. But when we establish a priority focus and we filter our decisions and our actions through that focus, it becomes much easier.

So here's what typically happens. Everything is coming at us all at once, especially at the beginning of the year, which is why I'm talking to you about this now during the summer while you are not being bombarded, while you're not at work. Even if you are working, some of you are 12 month employees. When the school year is not in session, you tend to feel a little more relaxed. That you have more time to slow your brain down and take a deep breath and think about and plan for the upcoming year.

But if you wait and you get into the throes of the beginning of the year where teachers are coming at you asking for all the things. Technology is coming at you trying to get set up. Your janitorial department's coming needing to clean this and clean that, and this teachers got their stuff on the carpet, and they need to clean the carpet. All of that stuff, right? Everything's gonna start coming at you at once.



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Something big will come up during the day and take up all your time. I call it a wipe out day. When you have a situation arise and it just wipes out your whole day. Those things happen. Many of us are constantly interrupted. What happens with that is that the important but non urgent tasks don't get done because the interruptions become emergencies, and they become the urgencies. Then the important things that you want to get to, but they're not urgent, they don't get done. They get pushed back day after day after day.

Then we end up trying to overwork. We work late or past the time when we told ourselves or our family that we would be home. We take the work home, or we tote it home and we never look at it, which I did that 80% of the time. I would pack all this stuff home. I'm gonna work on it at home. The minute I got home, I had family obligations. I never opened the bag at all.

We overschedule. We over plan. Then we get really discouraged. We get caught up in the overwhelm cycle. We find ourselves procrastinating or being really irritated when interruptions take us off track, and we just end up feeling behind all of the time.

This is the getting behind cycle. There's multiple needs. Everything's a priority. We feel very confused and overwhelmed. We play whack-a-mole in attempt to try and get ahead, but we feel super overwhelmed. Then we're disappointed. We feel unprepared. We feel behind, and then the needs built up. It's like a cycle we get trapped in.

But whack-a-mole doesn't work. We know this intellectually, right? But we don't think we have the time to slow down and plan. We don't believe we can manage or reduce interruptions. We don't think we have any control over them. So why bother? We have to stay in that reaction mode instead of being intentional because we don't believe we have the ability to be intentional.



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We think that we plan, and then our plan fails, and then something's gone wrong, and why bother? It was a bad use of time, right? That just leads to last minute hustling. It leads to stress, anxiety, overwhelm. It leads to physical stress, mental stress, emotional stress. We feel trapped, and we feel like we can't. There isn't a solution. That we can't solve this problem. Ultimately, we're not in control of our time. We're chronically behind, and we don't get to make the impact we want.

So why is it so hard for us to slow down and plan? Why is it hard for us to change the habit of reacting versus intentionally planning? Well, number one, other people have demands of us. They've got needs. They have urgencies. They come to us, and we want to help.

So it's hard to say no. It's hard to tell somebody else who has a need or a demand or who feels very urgent that they have to wait. That we can't help them right now in this moment. We have something else that's a priority or something else planned. So other people's demands makes us feel a lot of pressure, and then having to say no makes us feel bad.

It's hard to change because we don't value the time as much as we value helping others. It feels really good to help somebody in the moment. It's harder to say can I get back to you and value the amount of time we need to spend planning as much as we value helping them. It's really hard to honor that time.

You can put it on your calendar, but how often do you put planning on your calendar, and then something else comes up and we give in to that other thing, that other demand. It's hard to honor ourselves because we feel that other people's need should come first, and that our planning should come second to being available open door policy 24/7. You know how that goes, right? But that's why it feels hard.

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Here are the thoughts that make it feel hard. I can't slow down to plan. Other things are more important or pressing. I don't know what to expect three months from now. How could I possibly plan out? Things are going to come up anyway, why bother? I can't possibly plan that far ahead. I can barely get done today's work, let alone think three months in advance. I get it. I know those were all my thoughts at one time.

But here's the truth. You do have an idea of what's coming. Even if you're brand new as a principal, you know the rhythm of a school year as a teacher. You know the ebbs and flows and the seasons of the school year. So you can make a guess about what might be coming in, what you might have to do and be prepared for.

You do have the time. You always have the time for your priorities. You have to value planning time and planning out your three month plan. You have to value it enough to give it and invest your time in it. Right? Money is Time. Time is money. Those two resources that we have available to us, we invest them for a return on that investment. I'm going to sell you on the value of the return on investment when you plan in three months segments.

Planning now is going to make your life so much easier in the future. That is the truth your brain wants to tell you otherwise because it doesn't want to have to do the tedious work that comes with planning. It wants to just live in the moment and just do what comes your way and not have to sit down and think through and problem solve ahead of time.

It thinks I'll do that when it comes up. Why would I waste time now if that's not a problem? Let me just worry about it when I get there. But when you get there and you have the problem, now your brain is freaking out and fight or flight and it can't calm down enough to think through and problem solve from your prefrontal cortex. Okay.

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When you plan out your future, you experience the future with greater presence. So when you take the time to plan out your three month plan, what happens is when you are in the moment of the three month plan and you're living the three month plan, you are actually experiencing your job, your career with greater presence in that moment.

So what is the value of the three month plan? You stay three months ahead as a school leader. You know what to expect before it happens. You have a plan ahead of time, which calms your nervous system. You've anticipated obstacles and devised potential solutions. You've considered the details required, the small little things that are necessary in order for you to accomplish the goals you have set out for the next three months. Then you build in time to address unanticipated issues.

Things costs less when planned in advance, right. So I think about when I was planning my wedding. When I was planning my wedding a year in advance and looking for all of the details I had to think through, it was hard. I didn't want to do it. I didn't want to think about all the nitty gritty details of having this big, beautiful wedding.

But the earlier I did that number one, the more time I had to consider different options and research and look through the things I wanted. I got to pick exactly what I wanted, but the items cost me less because I was willing to do it ahead of time. So your three month plan, it costs you less time, and it costs you less money when you plan in advance, okay?

When you know your plan in advance, you can decide on the curriculum you want, the programs you want, you can decide what you're going to pay people so you can decide your resources, how you're going to allocate them, in advance, which saves you time and money in the end. Okay. You can visualize things going smoothly, which builds up your belief that things will go smoothly. The more you envision it going smoothly, the more smoothly it actually goes.

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You can decide ahead of time what to delegate, and you can map out your schedule so that you know exactly how you're going to spend your time. At the end of the day, you're not overworking. You're not having to hustle last minute to keep up. You feel good. You feel planned, prepared, attuned into what's going on, and focused.

The results that this process creates is work-life balance, clear and concise communication with your staff, families, and students, consistent actions over the course of time. It clarifies your process and your approach to teaching and instructional leadership, and it gives you the time to make the adjustments you need.

Ultimately you just become more valuable as a school leader. Because your time is effectively managed priorities and deadlines are met, problems are anticipated and solved for ahead of time, decisions are made so time isn't wasted in indecision. Communication is planned and sent out on time and in a timely manner. You get more done in less time, and you avoid last minute problems and expenses. You finally are able to stop overworking, stop over exerting, and stop over scheduling.

So here's the steps. They're very simple. When you become one of my clients, you're gonna get all the details. You're gonna get the template. I'm going to walk you through the process. I'm going to help you overcome obstacles that are in your mind and obstacles that are happening at work. But here are the five steps.

Number one, make a list. Number two, prioritize it based on your leadership and lifestyle values. Number three, map out the details. Number four, decide and delegate. Number five, calendar and honor. Okay.

Now, some things to consider when you're going through this process. You're just gonna make a list of everything you need to do in the next three months. You're gonna prioritize that list. Then for everything starting with

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the first thing, the first priority, you're going to map out all the details. Your mind is not going to want to do that. That is the nitty gritty of the work, but that's the magic of it.

Then you're going to decide who's going to do the work, which tasks are yours, which tasks you can delegate, and then you're going to calendar it, and you're going to honor it. There is no rocket science about any one of these five steps. I want to give you some things to consider.

You want to think about deadlines. You want to think about meetings and appointments, professional meetings, personal meetings, personal appointments, all of it. You want to think about fun and pleasure and travel and personal activities and events that you have going on. You want to think about the professional events you have going on at work.

You want to think about your accomplishments and your goal. You want to have one goal for the three month plan. One professional goal, or it can be personal goal, but a goal that you want to achieve no matter what in the next 90 days. Okay, so those are the things you want to consider.

Now, let me talk to you about some of the pitfalls. The biggest one is you'll get to step three, which is map out the details, and you won't want to do it because it's tedious. But I promise you do not skip that step even though you don't feel like it. Avoid that pitfall. Give yourself time and make yourself sit down and think of all the things you believe that you're going to need to accomplish in order for that task or that event or that activity or that meeting to be successful. So pitfall number one is not mapping out the details, because it feels tedious and hard and boring, and you don't want to do it.

Pitfall number two, not delegating. This is going to be the death of your three month plan. We have to learn how to trust others to do a good enough job or maybe even a better job than we would do. You are scaling up. In a future podcast, I'm going to talk about the value of trust. You've got

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to be able to trust others because you have to scale your ability to get more done in less time. There's only one of you. You only have so much time. Okay.

Another pitfall, pitfall number three, is not being able to say not now. No, thank you. I can't. Declining somebody else's urgency. Yes, there are true emergencies that come up at a school, but many of the interruptions we experience are not true emergencies. They are somebody else's urgency. Somebody else has a need for you to answer them ASAP, to talk with them ASAP, to solve their problem for them ASAP. We have to be willing to say not now, to schedule time later, or to redirect them. Or to say can I get back to you?

Number four, scheduling back to back. I see this happen all the time. How do I know this? I am so guilty of this. I schedule myself back to back to back. What happens is when you don't give yourself any amount of time for commute or a bathroom break or eating lunch or a meeting going over, you just feel disappointed every single day when you look at your calendar and you only got to half of your things, if that.

So pitfall number four is scheduling back to back. I advise you not to do this. Give yourself time and space between meetings. Plan time on your calendar for interruptions and be willing to have a wipeout day. Be willing to have to just throw the towel in that day and just readjust your three month plan. Okay.

Those are the basics. For those who want to work with me and dive deeper into the three month plan and to feel ahead and to be ahead and to not be stressed overwhelmed and overworked, I highly encourage you to schedule your consult call with me. Let's dive in and get started right now so we can get this plan in place.

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For those of you who sign up, now you're going to get the template, the three month plan template. I'm going to walk you through it. I'm offering workshops to my clients. So, actually, for those of you who are signing up now in the summer, you might be able to catch one of the three workshops that I'm offering to my clients only. They're getting some bonus training, some bonus workshops. You can jump in on those three month plan workshops where I'm going to guide you specifically through the template to get your plan up and running for the fall.

So jump in now. Now is the time. This is urgent because you want to get ahead of your fall. If you start the year off without the plan, it's going to feel very challenging for you to take the time to slow down and build your plan up. Okay. So I invite you to come in. Schedule your consult. Let's get going. Let's be a yes. Let's get your three month plan in place. I love you guys. Have a great week. Take care. Bye.

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