Planning Assistant Grounding file

### Copilot Agent Note:

|  |  |
| --- | --- |
| **Field** | **Content** |
| Purpose | encompasses the whole Interpretive layer or Agent guide |
| Trigger | Any use of the agent. |
| Action | To guide the interpretive layer of the agent |
| Tags | #master narrative |

#MasterNarrative

The Planning Assistant’s main objective is to maximise the amount of work completed within my set working hours and to maximise the billable hours I can charge to the customer.

The assistant will help by automatically triggering workflows, planning my time associated with those workflows. The Electrical Assistant is the parent of the Planning Assistant.

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**A Deep Life**

### Copilot Agent Note:

|  |  |
| --- | --- |
| **Field** | **Content** |
| Estimated vs Calendar Time Report | For weekly reporting |
| Purpose | To evaluate the accuracy of time estimations in Microsoft Planner by comparing them with actual time blocks recorded in the calendar. This supports continuous improvement in planning accuracy and workload forecasting. |
| Trigger | Weekly review session (typically Sunday evening) or on-demand when reviewing productivity or planning effectiveness. |
| Action | - Extract estimated durations from Planner task notes (e.g. ⏱ \*\*Estimated Time\*\*: 1h 30m)  - Match tasks to corresponding calendar events using tags and context  - Calculate the variance between estimated and actual time  - Highlight tasks with significant over- or under-estimation  - Feed insights into future planning cycles and simplification reviews |
| Tags | #TimeBlockPlanning #Productivity #PlanningAccuracy #Simplification #MasterNarrative |

#Productivity

Overview of the Process

The process or stack is broken up into two stages, and should be worked through consecutively. Stage one contains the first four areas.

**Stage One** – getting your act together and becoming an eminently qualified human being.

1. **Discipline** of the body, mind and heart.
2. **Control** over your situation using a weekly template, the timetable, a planning process, full capture and time block planning.
3. **Craft,** time spent improving abilities at work or on your hobby**.**
4. **Simplification** of processes by removing unnecessary steps.

You constantly cycle through these areas, improving as you go. Once you’ve got things under control and it feels like you’re on top of things, you’re ready to start stage two.

**Stage Two** – cultivating depth.

1. **Values**, develop your values, and use these as a guide to inform your decision-making when working through the stages.
2. **Service,** being of service to others.
3. **Transformation**, working towards your ideal lifestyle.
4. **Legacy**, look at your legacy in life

The process is iterative; once you master an area, you work back through the process, letting the work in the new area lead the cycle through the stack.

**Discipline**

#Discipline

Begin with small steps and gradually increase your challenges. Tackle one difficult task daily until discipline becomes routine, then add new habits one at a time.

Physical discipline is essential for health and effective performance.

Having strong mental discipline helps individuals manage stress, build resilience, and make better decisions in challenging situations. By practising self-control and mindful thinking, people can cope more effectively with negative emotions, reduce anxiety, and promote overall psychological well-being.

Heart-focused spiritual discipline is essential. This is because cultivating attentiveness to our inner values and emotions can lead to greater personal growth, ethical decision-making, and a deeper sense of purpose in life.

**Control**

#Control

**Weekly template**

#WeeklyTemplate

The weekly template structures my week and balances work with other aspects of life.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Day | Type | Start time | Finish time | E-mails | Shut down ritual |
| Monday | Fixed | 05:00 | 18:00 | 30 minutes | 15 minutes |
| Tuesday | Fixed | 05:00 | 18:00 | 30 minutes | 15 minutes |
| Wednesday | Fixed | 05:00 | 18:00 | 30 minutes | 15 minutes |
| Thursday | Fixed | 05:00 | 18:00 | 30 minutes | 15 minutes |
| Friday | Optional |  |  |  |  |
| Saturday | Optional |  |  |  |  |
| Sunday | Off |  |  | 60 minutes |  |

Fixed – I only work between these hours. Materials and Tasks need to be planned for the next day, and the shutdown procedure needs to be accommodated for before 18:00.

Optional – these days give me flexibility to work billable hours, office tasks, or develop my craft.

Off - this is my day off, only interrupted for emergencies, but includes a 60-minute planning session, to prepare calendar bookings a week or more in advance and tasks for the coming week.

**Timetable**

#Timetable

The timetable runs year-round, lagging one month behind the calendar year.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Quarter | Type | Start | End | Quarterly planning day |
| Winter | Q1 | December | February | The last Friday of February |
| Spring | Q2 | March | May | The last Friday of May |
| Summer | Q3 | June | August | The last Friday of August |
| Autumn | Q4 | September | November | The last Friday of November |

**The Quarterly Planning Day**

#QuarterlyPlanning

The quarterly planning day is dedicated to breaking down long-term goals into actionable tasks, assigning them to the quarterly plan (Plan i.d Y-yMjG00DEmEoSfE5KCcxJcAGk8m) in Microsoft Planner. The Planning Assistant helps by comparing estimated times in Planner to Calendar Events that have been tagged with relevant information from the Plans.

The current planning buckets include both work and personal projects.

* Family: The family unit consists of me, Amy, and our dog Wilbur. Bucket i.d 1n2iDM-yiE2\_9pjumfDck5cAFWXu
* Electric G Ltd: daily business operations. Bucket i.d oiwaCBZT40uA\_q14G0gibpcAKl-K
* Microsoft 365 Copilot – Enhancing system performance and maximising the value of my Copilot licence. Bucket Id aF-MFJZkN0imYZ9dBh68VpcANXet
* House – projects relating to the house. Bucket I.d GLCMg2MRmk6GgilAjwufvZcADI5y
* DBT skills – the implementation of Dialectic Behavioural Therapy skills into my life to help with managing ADHD. Bucket id Ez5hiVbE8EyuTe7I43u3S5cAGzVe
* Discipline – any new items to get started with and become habits. Bucket id 0hFI98o2lkqdj0puAOjdbpcAGp6P

**Full Capture**

#FullCapture

All communications are captured and a task assigned if required.

Any conversations that generate a task should be noted in my working memory file and then transferred digitally when I’m reading my e-mails.

E-mails should be assigned a priority in Outlook.

* 1 Critical – essential to daily operations
* 2 Important – not essential but important
* 3 Not critical - not important but but a nice-to-do

I keep day to day tasks directly in Microsoft To Do. There’s no need to use planner unless the task is required directly for a job or is to become part of a quarterly project.

I allocate tasks to the following bucket structure in Microsoft To Do:

* The "Ready" list contains tasks that are scheduled for completion within the current week.
* The “Back Burner” list contains the remaining tasks that are waiting to be done but don't fall into any of the other buckets.
* The “Waiting” list contains tasks that are waiting for a reply from someone.
* The “To discuss” list contains tasks that require discussion before updating and moving to another bucket.
* The “Clarify” list includes tasks that require additional information or clarification. These tasks may involve further research or take extra time to complete.
* The “Schedule” list includes tasks that can be scheduled at a regular time.
* The “Amy” list contains tasks I need to remind Amy to do.

This ensures the capture of everything; items may never be completed and may be deleted. This informs the process of simplification later in the stack.

**Time Block Planning**

#TimeBlockPlanning

Each Sunday evening, I review my tasks in the planner and allocate them to my calendar for the upcoming week, based on their estimated durations and priority. Time Block Planning captures tasks in Microsoft To Do, tasks from the Quarterly Plan in Planner and also Jobs (billable work) that will be generated from the Design and Costing Assistant. I haven’t completed this agent yet.

I also run a report to compare estimated times in the planner against actual times in the calendar. The planner has the following info entered under Notes in each task.

⏱ \*\*Estimated Time\*\*: 1h 30m

📅 \*\*Deadline\*\*: [Insert Date]

🔁 \*\*Recurrence\*\*: [e.g. Weekly, One-off]

🧠 \*\*Context\*\*: #billable #deepwork #lowenergy

📝 \*\*Notes\*\*: [Add any relevant notes or links]

This is also copied into the Notes section of the event.

**Craft**

#Craft

Ensure time is spent improving my craft. This might be CPD work or extending your experience in an area where you don’t feel as comfortable.

Ideally, do something each week. Some of the quarterly work covers this. The CPD file needs to be updated with any additional work you’ve done.

Do this on a Friday or Saturday when your work is optional.

[CPD Log](https://electricgcouk-my.sharepoint.com/my?id=%2Fpersonal%2Fgareth%5Felectricg%5Fco%5Fuk%2FDocuments%2FElectric%20G%20Ltd%2FCertificates%2FCPD%2F2025%2FCPD%2DRecord%20GY%202025%2Epdf&parent=%2Fpersonal%2Fgareth%5Felectricg%5Fco%5Fuk%2FDocuments%2FElectric%20G%20Ltd%2FCertificates%2FCPD%2F2025)

**Simplification**

#Simplification

Once processes are established, periodically review and consider simplifying existing workflows. Remove unnecessary steps where possible. For instance, developing an automated process for scheduling may introduce more complexity than benefit. Maintaining simplicity can help prevent complications. Focusing on automating areas such as design and costing may yield greater efficiencies.

**Values**

#Values

To change direction, start by clarifying your values. If you haven't done this before, read material that resonates and reflect on your priorities. Take some time to list your values in order of importance; they serve as your moral compass and guide decisions in Service, Transformation, and Legacy.

**Service**

#Service

Assisting others can contribute to a sense of purpose. This may take various forms and is often shaped by individual values.

**Transformation**

#Transformation

Start by defining your ideal life vision; this guides your long-term planning and helps you stay open to unexpected opportunities. As you progress, new possibilities may shift your direction and update your vision. This approach embraces life's unpredictability, making it more likely you'll achieve your goals.

**Legacy**

#Legacy

Consider what impact you would like to have on the planet, and what legacy you may leave for your children or family. This aspect is addressed last and, as with other areas, it contributes to ongoing changes through incremental improvements.