

PRODUCTIVITY WORKSHEET:

Build Your Not-to-Do List

Not-to-Do List Worksheet

Objective: Identify low-value tasks, cut or reframe them, and create space for what matters most.

1. Spot the Low-Leverage Tasks

Think about your day or week. What takes time but doesn't add value for members, your team, or your mission?

2. Decide: Automate, Delegate, Eliminate (For each task you listed, choose one:)

Task	Automate	Delegate	Eliminate	Why

3. Rituals That Matter

What new practices could you turn into rituals – consistent habits that strengthen member service or team culture? *Examples: starting each day with a 5-minute huddle, checking in on one member story, or ending the week by celebrating team wins.*

Rituals 1

Rituals 2

Rituals 3

Rituals 4

4. Recognize the Trade-Offs – Every “yes” is a “no” to something else. Fill in the blanks:

• When I say YES to

I’m saying NO to

• When I say NO to

I’m saying YES to

Build Your Not-to-Do List

Commit to your personal Not-to-Do List – tasks you’ll avoid, minimize, or redesign so you can focus on what matters most.