

# **Thank you!**

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## **Planning and Assessment Toolkit**

## **Welcome to Michelle Dionne Thompson Coaching and Consulting!**

Thanks for listening to me on your favorite podcast.

My work is designed to create sanity in the midst of insane industries, and one of the tools to make this happen is to plan, track, and assess to see what is working, what is not, change paths, or continue what you are doing.

You can use this booklet if you are any sort of writer, but it is geared towards academic writers.

It is divided into three sections:

- the first section is assessment or pulse taking.
- The second section is planning.
- The final section is tracking, particularly what you are writing. Print as many copies you need of the tracking journal, because you can use one every single time to sit down to write.

Let me know what works here, and what could be tweaked.

But most of all, this is the sort of tool that often works best with support to get you out of your way, and accountability to make sure you do what you set out to do.

I provide both for my clients and they have experienced success, including academic publication in journals and books by presses.

One way that you can learn even more about me and get more support about completing your assessment and planning toolkit is signing up for my newsletter.

[http://eepurl.com/c9N4\\_v](http://eepurl.com/c9N4_v)

Do not hesitate to connect with me if you need help.

Thanks for joining me on the podcast and I hope to hear from you again!



Michelle

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## Pulse-Taking



To See What Works and  
What Doesn't

## Pulse Taking – Academics

In addition to planning, it is important that we periodically assess what is going well about our work, and what we could dump. While some of the challenges you may face may seem hopeless, you can start generating ideas for shifting things. If you love that particular part of your job, you can start generating ideas for making it even better!

I recommend doing this sort of pulse-taking quarterly (every three months) and scheduling the time to do that. I would also recommend scheduling the steps for your improvements in your calendar.

- I. Writing – this may be the most important aspect of your work, regardless of where you are in the academic pipeline. Do make sure it is working out for you.

- a. Generally Satisfying?

1      2      3      4      5      6      7      8      9      10

Not at all

Satisfactory

Highly Satisfying

- b. What makes it satisfying/not satisfying? \_\_\_\_\_

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- c. How could it improve? \_\_\_\_\_

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- d. What are three steps you could take to improve it? \_\_\_\_\_

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- e. Do you need to think about how to get out of this part of your job and how would you do it? \_\_\_\_\_

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II. Teaching – often, teaching takes up more time than we want. This is a good time to see if there is a way to leverage the resources we need to let it both take less time and be more satisfying for us.

a. Generally Satisfying?

1      2      3      4      5      6      7      8      9      10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? \_\_\_\_\_

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c. How could it improve? \_\_\_\_\_

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d. What are three steps you could take to improve it? \_\_\_\_\_

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e. Do you need to think about how to get out of this part of your job and how would you do it? \_\_\_\_\_

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Pulse-Taking



To See What Works and  
What Doesn't

III. Administrative Work – this generally applies to people who are tenure track or beyond, although Doctoral Candidates do plan conferences and help with job searches.

a. Generally Satisfying?

1      2      3      4      5      6      7      8      9      10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? \_\_\_\_\_

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c. How could it improve? \_\_\_\_\_

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d. What are three steps you could take to improve it? \_\_\_\_\_

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e. Do you need to think about how to get out of this part of your job and how would you do it? \_\_\_\_\_

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Pulse-Taking



To See What Works and  
What Doesn't

IV. Job Search – this may apply to you regardless of where you are in the academic pipeline. Remember that you may want to keep open the possibility of doing non-academic work

a. Generally Satisfying?

1      2      3      4      5      6      7      8      9      10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? \_\_\_\_\_

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c. How could it improve? \_\_\_\_\_

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d. What are three steps you could take to improve it? \_\_\_\_\_

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e. Do you need to think about how to get out of this part of your job and how would you do it? \_\_\_\_\_

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Pulse-Taking



To See What Works and  
What Doesn't



V. Conferences – regardless of whether you are in academia, conferences are an important part of staying current with movers and shakers in your particular field, and seeing what the newest developments are.

a. Generally Satisfying?

1      2      3      4      5      6      7      8      9      10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? \_\_\_\_\_

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c. How could it improve? \_\_\_\_\_

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d. What are three steps you could take to improve it? \_\_\_\_\_

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e. Do you need to think about how to get out of this part of your job and how would you do it? \_\_\_\_\_

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Pulse-Taking



To See What Works and  
What Doesn't

VI. Networking – this is important for many reasons. You may build a network of people who are skilled in the classroom, those at a particular institution, those who have similar research, writing groups, etc. If you don't have any networks, you will want to intentionally develop them.

a. Generally Satisfying?

1      2      3      4      5      6      7      8      9      10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? \_\_\_\_\_

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c. How could it improve? \_\_\_\_\_

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d. What are three steps you could take to improve it? \_\_\_\_\_

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e. Do you need to think about how to get out of this part of your job and how would you do it? \_\_\_\_\_

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Pulse-Taking



To See What Works and  
What Doesn't

VII. Support System – who’s shoulder do you cry on? Who do you rant to? How do you manage the inevitable emotional ups and downs of your work? This is why you need to assess your support system.

a. Generally Satisfying?

1      2      3      4      5      6      7      8      9      10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? \_\_\_\_\_

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c. How could it improve? \_\_\_\_\_

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d. What are three steps you could take to improve it? \_\_\_\_\_

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e. Do you need to think about how to get out of this part of your job and how would you do it? \_\_\_\_\_

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Pulse-Taking



To See What Works and  
What Doesn't

VIII. General Life Satisfaction – if your job is going swimmingly, but nothing else is, including your health and well-being, you need to take this seriously. And if everything is going well, note why.

a. Generally Satisfying?

1      2      3      4      5      6      7      8      9      10

Not at all

Satisfactory

Highly Satisfying

b. What makes it satisfying/not satisfying? \_\_\_\_\_

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c. How could it improve? \_\_\_\_\_

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d. What are three steps you could take to improve it? \_\_\_\_\_

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e. Do you need to think about how to get out of this part of your job and how would you do it? \_\_\_\_\_

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Of course, after you pulse-take, if you need assistance with anything, or you need to strategize, please set up some time with me. I'm happy to help you think it through. Contact me at [michelle@michelledionnethompson.com](mailto:michelle@michelledionnethompson.com).

Pulse-Taking



To See What Works and  
What Doesn't

## Plan Your Work



## And Work Your Plan

## Planning – Academics

It is said that you must plan your work and work your plan. Indeed, you cannot arrive at your destination if you don't have a map to get there. Your plan is your map.

This doesn't mean that it's written in stone; however, it does mean you have a way there. You can adjust the route as necessary.

For this plan to work best, it has to be something that you generate. This worksheet looks at planning for the next three months. However, it may help you to think through where you want to be 10/20/25 years from now and direct your plan to that set of goals.

As a result, here are the areas you need to consider, add move if you would like, and make it work!

### I. Writing

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.

## II. Teaching

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.

Plan Your Work



And Work Your Plan

### III. Administrative Work

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.

Plan Your Work



And Work Your Plan



#### IV. Job Search

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.

Plan Your Work



And Work Your Plan

## V. Conferences

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.

Plan Your Work



And Work Your Plan

## VI. Networking

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.

Plan Your Work



And Work Your Plan

## VII. Support System

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.

Plan Your Work



And Work Your Plan

## VIII. General Life Satisfaction/Well-Being

In the next three months, I want to accomplish:

1.	2.	3.
Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.	Three steps I can take to do this are (include due date in parentheses):  1.  2.  3.

The word planning may leave you feeling out of sorts. You can get help with this! Feel free to contact me at [michelle@michelledionnethompson.com](mailto:michelle@michelledionnethompson.com) if you could use a hand.

Plan Your Work



And Work Your Plan

## Writing Journal

How can you set up a habit of tracking where you are, how it feels, and where to go next?  
By keeping a (brief) writing journal. I hope you find this to be as useful as I find mine!

**Date:** \_\_\_\_\_

**Objective for this writing session:** \_\_\_\_\_

\_\_\_\_\_

**How do you want it to feel?** \_\_\_\_\_

\_\_\_\_\_

**General Notes:** \_\_\_\_\_

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**Where do you start next time and what should you do?** \_\_\_\_\_

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