

WORK SMARTER FROM HOME

WORK SMARTER TOOLKIT

Reusable planners, checklists and worksheets

The chapter exercises helped you apply each idea as you learned it. This Toolkit is different. These pages are designed to be reused as your work, priorities, and routines change.

Print or copy the pages you use most often. You do not need to use every tool. Choose the ones that remove friction, help you stay organized, and make your workday easier.

How to Use the Toolkit

- ☐ Start with one or two tools rather than trying to use everything at once.
- ☐ Reuse planners and trackers weekly or monthly.
- ☐ Adjust the tools to fit your job and your employer's policies.
- ☐ Keep what works. Stop using what does not.

WORK SMARTER QUESTION:

Which tool would make the biggest difference in your workday right now?

WORK SMARTER FROM HOME

1. WFH Workspace Audit

Use this audit whenever your workspace starts feeling uncomfortable, cluttered, or inefficient.

Workspace Basics

- ☐ My primary screen is positioned comfortably.
- ☐ My keyboard and mouse are easy to reach.
- ☐ My chair and feet are supported.
- ☐ My lighting works for focused work and video calls.
- ☐ My camera is positioned near eye level.
- ☐ My microphone/headset handles household noise appropriately.
- ☐ Power outlets and charging are convenient.
- ☐ Cords are controlled and out of the way.
- ☐ Frequently used items have a permanent home.
- ☐ My video-call background is work-ready.

My Next Improvements

The biggest source of distraction in my workspace:

Three improvements I want to make:

2. My Ideal WFH Day

Map a realistic workday around your responsibilities, energy, meetings, and focus time.

Daily Anchors

Start time:

Morning setup/routine:

Best focus window:

Lunch/break:

Email/admin windows:

Shutdown time:

What Makes This Day Work

One boundary I want to protect:

One thing I will prepare the night before:

3. Weekly Work Smarter Planner

Use this at the beginning of the week to decide what matters before the week decides for you.

My Top 3 This Week

1.

2.

3.

Weekly View

Day	Focus / Priority	Meeting or Deadline
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		

Work Smarter Question

What can I eliminate, delegate, automate, or make easier this week?

4. Daily Top 3 Planner

A simple daily page for keeping the most important work visible.

Today's Top 3

1.

2.

3.

Today's Schedule

Important meetings/deadlines:

Focused work block:

Smaller Tasks / Notes

Before I Shut Down

What needs to carry forward to tomorrow?

5. Email Cleanup Checklist

Use this for an inbox reset or as a recurring maintenance checklist.

Inbox Reset

- ☐ Delete obvious junk and outdated messages.
- ☐ Unsubscribe from email I no longer need.
- ☐ Archive messages I need to keep but do not need in my inbox.
- ☐ Create folders/labels that actually help me find information.
- ☐ Create a rule for one repeated type of message.
- ☐ Flag or move messages that require action.
- ☐ Turn off at least one unnecessary notification.
- ☐ Create a reusable response/template for a repeated reply.

My Email Routine

Times I will intentionally check email:

One inbox habit I want to stop:

6. Digital File Cleanup Checklist

Use this when your desktop, downloads, shared folders, or project files start becoming difficult to manage.

File Reset

- ☐ Clear or organize my Downloads folder.
- ☐ Remove duplicate or obsolete files.
- ☐ Move important files into approved company storage.
- ☐ Use clear, consistent file names.
- ☐ Create or simplify project folders.
- ☐ Archive completed work appropriately.
- ☐ Confirm shared files are stored where the team can find them.
- ☐ Remove sensitive files from locations where they should not be stored.

My File Standard

Example of a file name I will use consistently:

One folder I will clean today:

One storage habit I will improve:

7. Meeting Planner

Use this before an important meeting and complete the action section before you move on to the next thing.

Before the Meeting

Meeting / date:

Purpose / desired outcome:

People who truly need to attend:

Agenda:

After the Meeting

Decisions made:

Action items / owner / due date:

8. AI Task Finder

Use this to identify work where AI may save time without replacing your judgment.

Look for Opportunities

A task I repeat:

A task that requires summarizing or organizing information:

A task where a first draft would save time:

Before I Use AI

- ☐ AI is permitted for this task.
- ☐ I can protect confidential or sensitive information.
- ☐ I know what a good result should look like.
- ☐ I will review and validate the output.

My First Test

Task I will test:

How I will measure whether it actually saved time:

9. AI Prompt Builder

Use this framework when you want a stronger, more useful AI response.

Build the Prompt

CONTEXT — What does AI need to know?

GOAL — What do I want it to do?

AUDIENCE — Who is this for?

REQUIREMENTS — What must be included or avoided?

OUTPUT — What format, tone, or length do I want?

My Complete Prompt

10. My AI Prompt Library

Save prompts that worked so you do not have to reinvent them.

Prompt Library

Task	Prompt / Key Instructions	What Worked	Changes for Next Time

My Best Prompt

Prompt I want to keep and reuse:

11. Automation Finder

Before buying a tool or building a complicated workflow, look for the simplest way to remove repeated work.

Spot the Repetition

Task I repeat:

How often I do it:

Approximate time each time:

What triggers the task:

Could I Simplify It With...

- ☐ An email rule or filter
- ☐ A reusable template
- ☐ A recurring calendar/task reminder
- ☐ AI assistance
- ☐ An approved automation/workflow tool

My Test

Smallest version I can try:

How I will verify it worked correctly:

12. Weekly Accomplishment Tracker

Remote work can make good work less visible. Keep a simple record of outcomes you may want for status updates, reviews, or career conversations.

This Week I...

Completed:

Solved / improved:

Delivered a measurable result:

Received positive feedback or recognition:

Looking Ahead

My next priorities:

Risk, blocker, or decision leadership should know about:

13. WFH Security Checklist

Use your employer's policies first. This checklist is a reminder of common work-from-home security habits.

Security Check

- ☐ MFA is enabled where required.
- ☐ My work device locks when I step away.
- ☐ I use approved VPN/network practices.
- ☐ Work files are stored only in approved locations.
- ☐ Work and personal accounts/files remain separate.
- ☐ I pause before opening unexpected links or attachments.
- ☐ My screen and sensitive conversations are protected from others at home.
- ☐ I know how to report a suspicious message or security concern.

One Security Improvement

What needs attention?

Action I will take:

14. End-of-Day Shutdown Checklist

Use this short routine to close the workday instead of letting it quietly continue into the evening.

Before I Log Off

- ☐ Review unfinished tasks.
- ☐ Identify tomorrow's Top 3 or first priority.
- ☐ Send or schedule any final important communication.
- ☐ Update project/status notes while details are fresh.
- ☐ Close unnecessary tabs and applications.
- ☐ Plug in devices that need charging.
- ☐ Reset my desk/workspace.
- ☐ Log off and leave work behind.

Tomorrow Starts With

My first priority tomorrow:

Anything I need ready before I begin:

15. Monthly Work Smarter Review

Once a month, look at your systems instead of only looking at your workload.

Keep

What worked well this month?

Change

What repeatedly wasted time or caused frustration?

Improve

One process, routine, tool, or boundary I will improve next month:

My Work Smarter Commitment

Next month I will:
