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AI / BUSINESS GROWTH / GUIDE & WORKBOOK

The Three Small Wins System — Capacity-Aware Priority Planning Guide

A non-clinical UK SME planning guide and workbook for selecting up to three controllable next actions, scheduling them realistically, checking capacity and work-design barriers, and reviewing or rescheduling without treating a missed task as failure.



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Capacity–Aware Priority Planning Guide

Guide & workbook

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Use this guide your way

This is a practical planning guide for ordinary work priorities. It offers a way to choose **up to three controllable next actions**, place them in a real week, and revise the plan when circumstances change. It is not a performance scorecard, a health assessment or a test of commitment.

Use only the prompts that are useful. Keep your notes private. You do not need to explain disability, illness, caring responsibilities or other personal circumstances to use this workbook. Do not ask an employee to share a completed worksheet, and do not use it for appraisal, monitoring, fitness-to-work decisions or any assessment of personal wellbeing. Do not paste personal reflections, employee information or sensitive work details into an AI tool.

A missed action is information for the next plan, not a failure. It may show that the action was too large, depended on someone else, had no realistic time assigned, or belonged in a workload conversation rather than on one person's list.

The idea: a limit, not a target

A **small win** is a bounded action that is within your reasonable influence. It is not a promise of an outcome. For example, “draft three questions for the client handover” is within one person's influence; “make the client approve the handover” is not.

The system uses a maximum of three actions because a small limit can make a plan easier to inspect. Three is not a magic number. On a settled week, you may choose three actions. On a demanding week, one action may be enough. On a week shaped by urgent work, caring, illness, access needs, leave or an unsafe workload, the most useful plan may be to choose none and raise a work-design issue instead.

The point is not to fit more into the week. The point is to make a clearer decision about what can reasonably happen next.

A useful distinction

Instead of planning...	Try planning...
"Finish the proposal"	"List the three decisions the proposal needs to make."
"Sort out the new starter process"	"Write the current handover steps and mark the owner for each."
"Get on top of email"	"Block 20 minutes to identify the five messages that need a decision."
"Improve the client relationship"	"Prepare two questions for the next agreed check-in."

These are examples, not rules. A good action is clear enough for you to recognise whether you attempted it, small enough for the time you genuinely have, and connected to a decision or piece of work that matters now.

Start with capacity, not ambition

Before you select actions, look at the week you actually have. Include fixed commitments, dependencies, leave, access needs, caring commitments and the degree of control you have over your time. This is a planning check, not a request for personal disclosure.

Capacity check

Tick any statement that applies today.

- ☐ I can name a real time window for at least one action.
- ☐ I have enough authority or information to take the proposed action.
- ☐ The action does not depend on a reply, approval or availability I cannot control.
- ☐ I have allowed for known commitments and likely interruptions.
- ☐ I can reduce, divide, delegate or defer the action if capacity changes.
- ☐ The main barrier is not a workload, role, resource, deadline or decision issue that someone else needs to address.

If several boxes are unticked, reduce the plan before trying to improve your personal routine. You might choose one action, divide a task into a first visible step, ask for a decision, delegate, reschedule, clarify scope, or raise a workload concern.

When the issue belongs to the work

Personal planning cannot fix an unreasonable workload, missing resources or conflicting priorities.

HSE's Management Standards set out six work-design areas: **demands, control, support, relationships, role and change**. They include workload and work patterns, how much say people have in their work, available support, positive working relationships, role clarity and how change is managed. HSE says employers have a legal duty to protect employees from work-related stress through risk assessment and action. [1](#)

For managers, this means using planning conversations to change the work where needed: agree what stops, clarify who decides, revise a deadline, provide resource or training, remove a conflicting request, or explain a change. It does **not** mean asking people to compensate for a design problem with longer hours or private wellbeing disclosure.

Acas similarly lists too many or conflicting demands, little control, lack of support, unclear roles and organisational change among factors that can cause work-related stress. [2](#)

Work-design conversation prompt

The work issue I need to raise is:

The decision, resource, priority or role clarification that would make it more workable is:

The person or forum to raise it with is:

I will keep the conversation to work arrangements and share personal information only if I choose to:

The five-part planning sequence

1. Name one working objective

Choose one piece of work, decision or responsibility that would benefit from a clearer next step. It can be modest. It does not need to be a life goal or a measure of your value.

Working objective

I want to make progress on:

A useful next stage would be:

Why this matters to the work, customer, team or decision:

Keep the objective loose enough to revise. New information, changed priorities and other people's decisions may make an earlier objective less relevant.

2. Choose up to three controllable next actions

Write actions, not hoped-for results. Aim for actions that can be completed or usefully attempted without waiting for someone else to do their part.

- **Specific:** state the first visible piece of work.
- **Bounded:** give it a sensible edge, such as one outline, one call preparation, one decision note or one set of questions.
- **Within influence:** distinguish what you can prepare, decide or request from what another person must approve.
- **Proportionate:** choose a size that respects the capacity check.

Do not force three. One well-chosen action can be the entire plan.

3. Put each action in a real window

A plan becomes more usable when it has a place in the week you actually have. Select a time window and one alternative only where that is helpful. A backup is not an instruction to work late or give up rest; it is a way to decide what to revisit if the original window disappears.

Action	Realistic time window	Alternative, if needed	What must be in place first?
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____

4. Use a start cue only if it helps

An **if-then plan** is simply a way to write a cue and an action in advance. It is optional. It is not a guarantee, and it is not a test of willpower.

If happens, then I will .

Examples: “If my 10:30 meeting ends on time, then I will open the handover document and write the first three headings.” Or: “If the client decision has not arrived by Thursday, then I will send one concise request for the decision and park the dependent task.”

If a cue creates pressure or does not fit your job, skip it. A calendar entry, a paper note, a quiet pause before starting, or no cue at all can be preferable.

5. Review, reschedule or release

At the end of the week, review the plan without turning it into a score. Ask what changed in the work and what adjustment follows. A carried-forward action is allowed; so is dropping an action that no longer matters.

Action	What happened?	What did the work reveal?	Next decision
_____	_____	_____	Complete / reschedule / divide / delegate / stop
_____	_____	_____	Complete / reschedule / divide / delegate / stop
_____	_____	_____	Complete / reschedule / divide / delegate / stop

Avoid completion percentages and personal ratings. The useful output is a next decision, not a record for anyone else to judge.

A worked SME example

Illustrative example — not a customer story or a promised result

Amal manages a small service team preparing for a client handover. The original plan says “complete the handover pack this week”. On checking capacity, Amal sees that the pack depends on decisions from two colleagues, a new starter needs support, and there is only one short uninterrupted window in the diary.

Instead of treating the whole pack as a personal task, Amal writes one objective: “prepare the information needed for the handover decision.” The plan becomes:

1. List the missing decisions and owners in the handover document.
2. Draft five questions for the client conversation.
3. Ask the director to confirm whether the deadline or the scope should change.

The third action is a work-design action, not a request for Amal to work harder. If the director cannot change the deadline, that becomes a separate decision about what will not be included. The plan is reviewed after the client conversation and may be replaced entirely. No part of this example assumes that every task will be completed or that a person should disclose private circumstances.

Obstacles: change the plan, not the story about yourself

“I forgot the action.”

Make the action visible where you already work: a calendar entry, project board, paper list or the first line of a meeting note. If reminders create noise, remove them and choose a single planned review point instead.

“The task still feels too large.”

Find the first decision or artefact. Replace “prepare strategy” with “write the question the strategy must answer”. Replace “fix the process” with “map the current handoff in five lines”. If there is no credible first step, the task may need a scope decision rather than a smaller personal action.

“Someone else has not replied.”

Separate your controllable action from the dependency. You may prepare the request, set a follow-up date or raise the impact of the delay. You cannot plan another person’s response as your win.

“I did not complete it.”

Choose one response: reschedule, divide, delegate, clarify, renegotiate, or stop. Do not automatically add the task to an already full plan. If missed tasks are recurring, bring the pattern to a workload or priority conversation.

“I have a new idea.”

Use a future list rather than interrupting the current plan. Write the idea in one line and return to it during the next review. A future list is a parking place, not a backlog you must clear.

Private accountability options

The original action belongs to you. You may keep the plan entirely private, share a work-only commitment with a trusted colleague, or use a manager conversation to resolve scope, resources or priorities. Public promises, social-media updates, reward schemes and detailed personal tracking are not required.

If a manager needs a view of work, use a normal project update: priority, dependency, risk, decision needed and agreed next step. Do not collect personal reflection notes, wellbeing scores or health information as a substitute for managing work. ICO guidance explains that worker monitoring engages data-protection responsibilities and workers' data-protection rights. [3](#)

Choose your boundary

- ☐ I will keep this worksheet private.
 - ☐ I will share only the action or dependency needed for the work.
 - ☐ I will ask for a decision about scope, deadline, support, role or resource.
 - ☐ I will not use this worksheet as a record of anyone's health, capacity score or personal circumstances.
-

Your one-week planning worksheet

A. Capacity first

Time and control I genuinely have this week:

Commitments, dependencies or access needs that affect the plan:

One adjustment that would make the work more workable:

Is a workload, role, resource, deadline or priority conversation needed? Yes / No If yes, my next work-design action is:

B. Up to three small wins

Tick when attempted	Controllable next action	Time window	Backup or decision point	Support, resource or clarification needed
[]	_____	_____	_____	_____
[]	_____	_____	_____	_____
[]	_____	_____	_____	_____

C. Optional cue

If , then I will .

Or I will use this other start prompt:

D. End-of-week review

What changed in the work?

Which action should be completed, rescheduled, divided, delegated, clarified or stopped?

What needs to change in the work itself next week?

Final action plan

Choose the smallest honest version of the plan. You can return next week and choose differently.

Working objective:

One action I can reasonably influence:

When I will consider it:

What I will do if capacity changes:

Work-design action, if needed (scope / priority / resource / role / deadline / support):

What I will keep private:

Next review point:

References

1. [What are the Management Standards?](https://www.hse.gov.uk/stress/standards/overview.htm)

<https://www.hse.gov.uk/stress/standards/overview.htm>

2. [Causes and signs of stress – Managing work-related stress](https://www.acas.org.uk/managing-work-related-stress)

<https://www.acas.org.uk/managing-work-related-stress>

3. [Employment practices and data protection: monitoring workers](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/employment/monitoring-workers/)

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