

Exercise

This exercise will help clear your mind of all your unresolved tasks. While you can complete this activity by yourself, it's recommended that you work with a partner. This exercise will take approximately one hour to complete.

By Yourself—Read the first trigger item on the list aloud. Think about that trigger. If any unresolved task comes to mind, write it down. If nothing comes to mind, move on to the next trigger, repeating this process until you have completed the exercise.

With a Partner—Have your partner read the first trigger item on the list aloud. Think about that trigger. If any unresolved task comes to mind, write it down. If nothing comes to mind, say "next." Your partner should move on to the next trigger, repeating this process until you have completed the exercise.

Business

Focus: Leadership

Company/department values, vision, mission
Leadership training
Time management
Personal systems
Personal development
Skills to learn or improve
Books to read
Important read and review
Decisions to tell employees
Networking
Items to disengage from
Questions to ask and consider
Items to discuss with coach
Exit or harvest strategy
Business ideas
Ideas for expansion

Focus: Personnel

Meetings with co-workers
Meetings with contractors
Organization chart
Hiring or firing
Managerial training
Events or Meetings to plan
Employee loyalty projects
Commitments/promises to coworkers
Getting to know and serving coworkers
Coworkers' evaluations and reviews
Waiting for: something from coworkers
Position descriptions
Responsibilities to delegate
Follow-up on delegated items
Managerial systems
Ideas for organizational change

Focus: Marketing

Marketing projects, incomplete or new
Documents for marketing or advertising
Waiting for: something from marketing
Company/office decor
Advertising campaigns
Web site items
Online research
Target market analysis
Research: competitors
Research: market/industry
Strategic alliances or partnerships
Professional wardrobe or uniforms
Marketing systems
Marketing message ideas
Ideas for advertising campaigns

Focus: Customers

Commitments/promises to customers
Customer loyalty projects
Customer loyalty training
Complaints to resolve
Best customers—re-contact
Best customers—gifts and perks
Customer loyalty systems
Waiting for: customer reports/feedback
Waiting for: something for customers
Waiting for: something from customers
Ideas for customer loyalty

Focus: Product/Services

Fulfilling promises made by marketing
Inventory
Production equipment
Service representative training
Outsourced suppliers
Meeting with outside sales reps
Production systems
Ideas for new products
Ideas for new services

Focus: Sales

Follow-through: prospects
Groups or associations to join
Presentations
Referrals
Sales forecasts
Sales quantification/tracking/reports
Sales training
Re-contact old customers
Sales systems
Waiting for: prospect replies
Waiting for: sales reports/feedback
Ideas for new sales systems

Focus: Business Finances

Meetings with financial professionals
Accounting and bookkeeping
Invoices and accounts payable
Waiting for: accounts receivable
Budgets
Financial reports (P/L, cash flow, balance)
Cash flow management and credit lines
Financial analysis/strategic planning
Waiting for: financial reports
Money security, checks and balances
Customer identity security
Petty cash
Reimbursements and requisitions
Financial systems
Ideas for money liabilities to lose
Ideas for money assets to purchase

Focus: Administration

Gathering points
Office organization/layout
Building maintenance
Utilities
E-mail
Faxes
CRM or contact software
Other software
Computers, monitors, printers
Cell phones or office phones
Internet and network
Computer/IT unification
Computer backup
Computer security (firewall, virus, etc)
Desks, chairs, furniture
Filing cabinets, folders, archives
Physical inboxes, outboxes
Equipment to buy

Personal

Focus: Self

Personal values, vision
Personal goals
Physical health: exercise
Physical health: nutrition
Mental health
Spiritual health
Doctors, dentists, specialists
Waiting for: medical data
Personal trainers/coaches/mentors
Books to read
Education
Hobbies
Talents to develop
Stress management
Commitments/promises to self
Meditation
Ideas for recreation

Focus: Personal Finances

Financial vision, goals
Budget and cash flow
Bills to pay
Credit cards
Utilities
Tax-related items
Allowances
Banks and other financial institutions
Mortgages and repayment plans
Loans and repayment plans
Accountant, lawyer, financial planner
Real estate
Landlord
Investments
Estate and retirement planning
Waiting for: rebates
Waiting for: financial information

Focus: Family

Commitments/promises to family
Couple values, vision, goals etc.
Important discussions: couple
Important discussions: children
Recurring dates/recreation with spouse
Recurring recreation with children
Family events and recreation
Family projects
Birthdays, anniversaries, holidays
Weddings, graduation, significant events
Waiting for: something from family members
Family meetings, planning, discussion
Ideas for family recreation and travel
Other ideas for family

Focus: Friends and Community

Commitments/promises to friends
People to get to know
Community groups, clubs, to join
Social events
RSVPs (waiting for or to send)
Sporting events
Community events
Community service projects
Waiting for: community info
School/Institution events
Church/Spiritual service
Legal, crime, security issues
Emergency preparedness
Homeowners association items
Waiting for: items lent
Borrowed items to return
Items to disengage from
Ideas for community service

Focus: Home

Filing and reference plan
Gathering points
Areas to organize, clean
Builders and contractors
Heating and air-conditioning
Plumbing: fixtures, toilets, shower
Electricity, light bulbs, wiring
Roofing
Landscape and driveway
Garage and storage
Walls, floors, ceilings
Décor, furniture, accessories
Kitchen appliances
Closets
Computers, printer, monitor
Software
E-mail
Computer backup
Internet & home network
TV, cable, satellite
DVDs, CDs, digital media
Cameras, film, digital pictures
Phones and voicemail
Sports equipment
Vehicle repair: external and internal
Vehicle maintenance: major and minor
Tools
Luggage
Pets
Clothes
Errands
Ideas for home improvement