- ☐ DEFAULT DE-BRIEFING PROCESS WEEKLY (CAN CUSTOMIZE) KEEPS LIFE CURRENT + HEAD CLEAR
- ☐ CUSTOMIZE LIST SORTING [DUE DATE, PRIORITY, PROJECT, AGE, SIZE, PERS VS. PROF., ETC.]
- ☐ CROSS REFERENCE PROJECTS TO RELATED ACTIONS, WTG. FOR's, REFERENCE, PEOPLE, DATES, MTGS.., ETC.
- ☐ DECISION-MAKING AND ORGANIZING EXPERT SYSTEM ASSISTANCE BUILT IN
- ☐ RETROSPECTIVE CALENDAR ARCHIVE/LOG
- ☐ GLOBAL SEARCH
- ☐ GATEWAY TO ALL OTHER SOFTWARE (WHILE PROCESSING)
- ☐ ALLOWS FREE-FLOWING THINKING WHILE TRACKING ~~TYPE~~ TOWARD CLOSURE
- ☐ RULES-BASED CUSTOMIZING (EG. EVERY AA FLIGHT SCHEDULED, SCHEDULE 72 HR. UPGRADE)
- ☐ PRINTS ANY VIEWS IN ANY HARD-COPY FORMAT [EG. BY MTG. PERSON, DATES, PROJECT]
- ☐ GENERATES COMPLETE HARD-COPY SYSTEMS WITH UP-TO-THE-SECOND LISTS + DATA
- ☐ TAG ANY FILE/LOCATION/ACTIVITIES → IN-BASKET TO ENSURE LATER CLOSURE [OR MAKE ANY NOTE]
- ☐ ALARM

IN

IN PROCESS

| PROJECTS | NEXT ACTIONS | WAITING FOR... | CALENDAR | COMMUNICATION | MEETINGS | SOMEDAY MAYBE'S | FOCUS AREAS |

| CHECKLISTS | REFERENCE | COACHING | FIND |

MONTH

WEEK

WAITING FOR'S...

NEXT ACTIONS

PROJECTS

CALLS

OTHER

ERRANDS

ONLY ON
SUNDAY APR 10

TIME-SPECIFIC   DAY-SPECIFIC

[DUE BY TODAY]

[START BY TODAY]

DAY-SPECIFIC NOTES

SUN	MON	TUE	WED	THU	FRI	SAT	SUN
BOS	BOS MAP	BOS MAP	→ PHL	YPO	→ LAX	OJAI	OJAI

TO PROCESS

🚩 YOU HAVE ____ ITEMS IN YOUR IN-BASKET
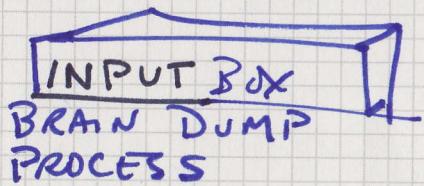
🚩 YOU HAVE ____ PROJECTS WITH NO NEXT ACTION DEFINED

🚩 PREVIOUS CALENDAR ITEM NOT COMPLETED !

INPUT BOX
BRAIN DUMP
PROCESS

PROJECTS
VIEW ACTIVE...
VIEW SOMEDAY'S...
NEW...

NEXT ACTIONS
LIST...
NEW...

WAITING FOR'S
LIST...
NEW...

CALENDARS
VIEW TODAY...(MO/YR.)
ADD...
TICKLER...

MEETINGS
- VIEW
- ADD...
- EDIT...

COMMUNICATIONS
CREATE...
SEND...
EDIT...

VIEWS (SETS)
CURRENT COMMITMENTS
AREAS OF FOCUS
GOALS/OBJECTIVES

FIND
BY PERSON
BY KEY WORD
BY DATE
BY PROJECT
BY AREA
BY DATE RANGE
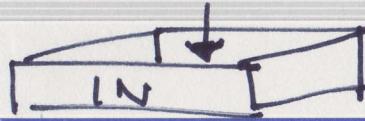
FOCUS AREAS
VIEW...
ADD...
EDIT...

REFERENCE LISTS
- VIEW...
- ADD...
- EDIT...
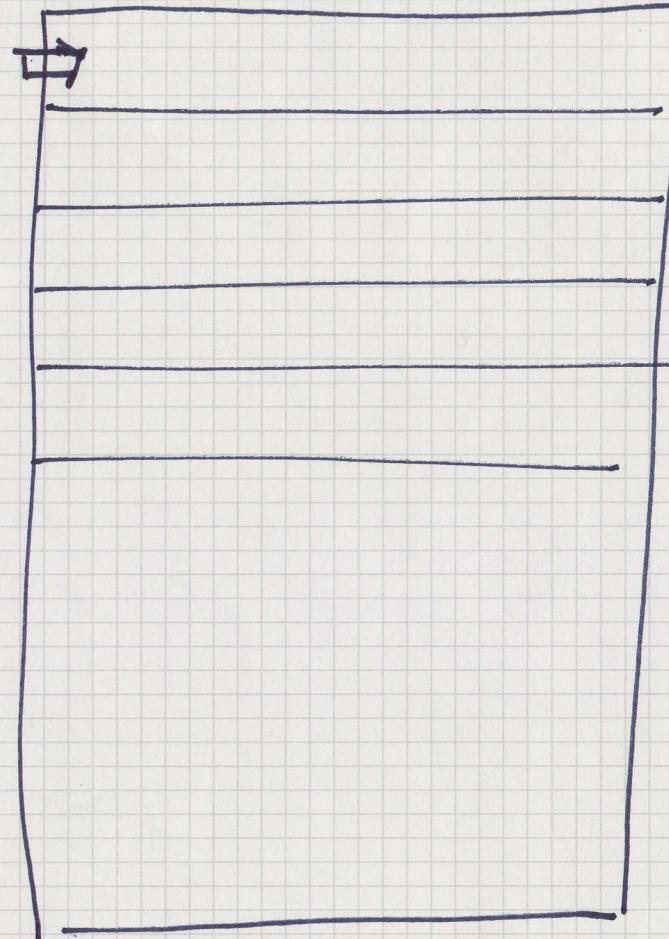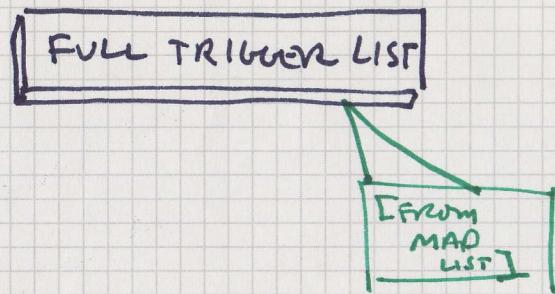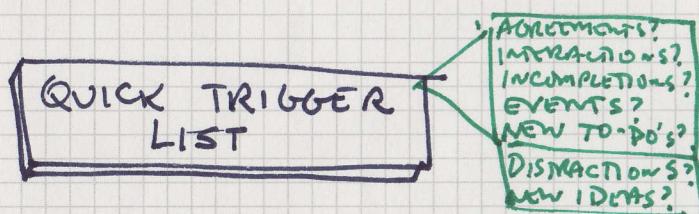
SCALE: ½" =

IN

WHAT'S ON YOUR MIND...?

QUICK TRIGGER LIST

AGREEMENTS?
INTERACTIONS?
INCOMPLETIONS?
EVENTS?
NEW TO-DO'S?
DISTRACTIONS?
NEW IDEAS?

FULL TRIGGER LIST

[FROM MAD LIST]

PROCESS NOW

ADD TO IN-BASKET

IN PROCESS
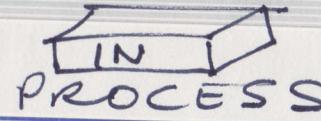
SCALE: 1/2" =

(1st) ITEM _____

ACTION ON THIS.

- COMMITTED TO DO SOMETHING ABOUT THIS?

OR

ACTIVATE

INCUBATE

ELIMINATE

□ NO → □ DISCARD?
→ □ SOMEDAY/MAYBE?... → GO TO "SOMEDAY"
→ □ REFERENCE/SUPPORT.

□ YES

□ POTENTIALLY MORE THAN SINGLE STEP?

(GO TO "PROJECTS")

OR...

TITLE PROJECT/OUTCOME _____

WHAT'S THE NEXT ACTION? _____

GO TO "NEXT ACTIONS"

□ SIMPLE ACTION

□ LESS THAN 2 MIN?
(ALARM) DO IT

CAN IT BE DELEGATED?

□ NO → GO TO "NEXT ACTIONS"
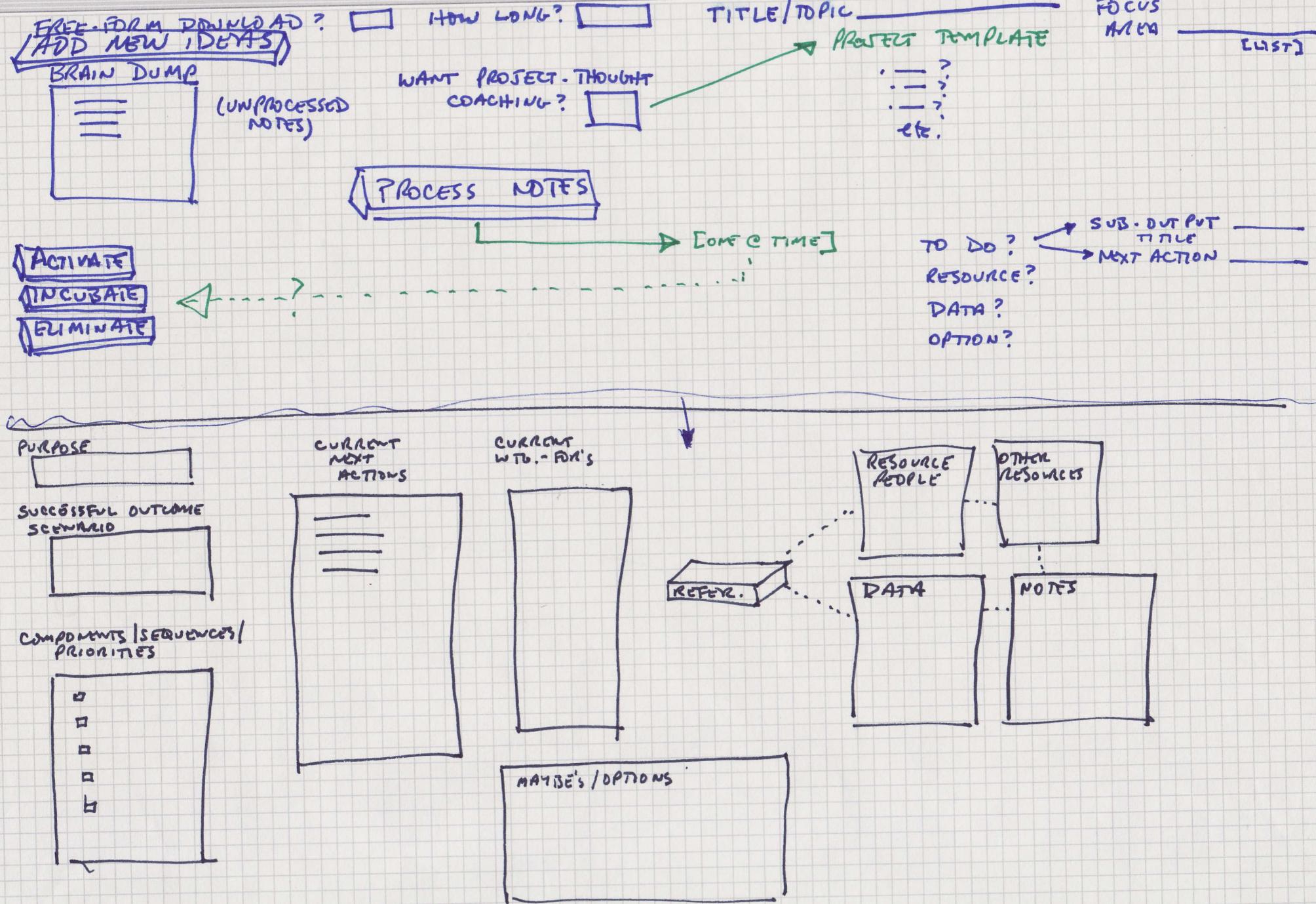
□ YES → GO TO "COMMUNICATION"

FREE-FORM DOWNLOAD? ☐   HOW LONG? ☐   TITLE/TOPIC _____   FOCUS AREA _____

(ADD NEW IDEAS)   [LIST]

BRAIN DUMP   PROJECT TEMPLATE

(UNPROCESSED NOTES)   WANT PROJECT-THOUGHT COACHING? ☐   · ? / · ? / · ? etc.

PROCESS NOTES

[ONE @ TIME]

TO DO? → SUB-OUTPUT TITLE _____
                ↘ NEXT ACTION _____

RESOURCE?

ACTIVATE

INCUBATE   ? ←------------

ELIMINATE   DATA?

OPTION?

PURPOSE   CURRENT NEXT ACTIONS   CURRENT WTG.-FOR'S   RESOURCE PEOPLE   OTHER RESOURCES

SUCCESSFUL OUTCOME SCENARIO   REFER.   DATA   NOTES

COMPONENTS | SEQUENCES / PRIORITIES

MAYBE's / OPTIONS

ENTER DATE

LIST (DUE-DATED FIRST)

———→ [EACH]

EXPECTED BY
DELEGATED
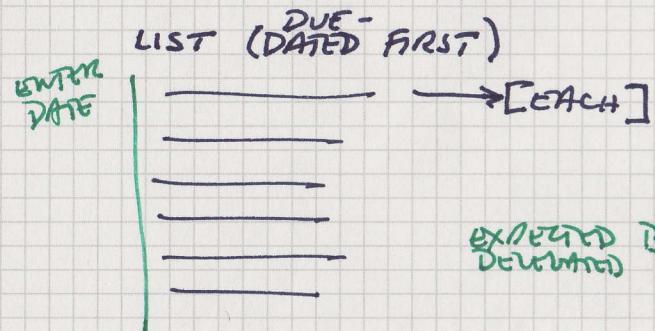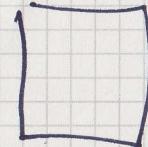
PLANS/OUTLINE/ORGANIZATION
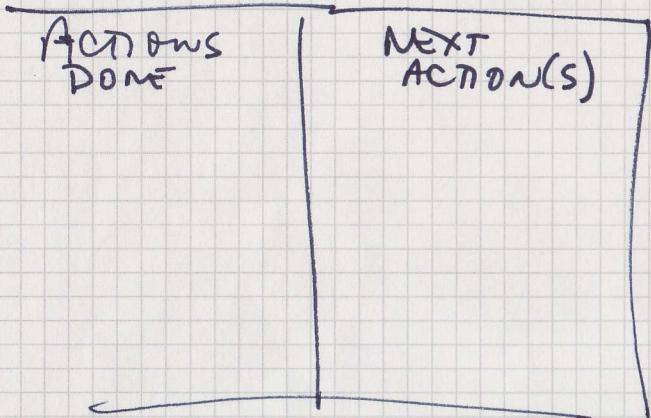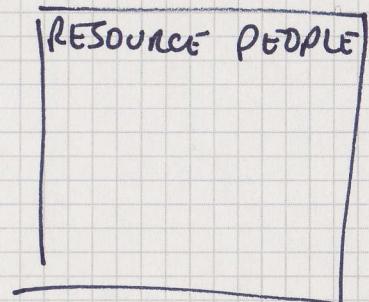
PURPOSE/GOAL/VISION
STANDARDS

SUCCESSFUL
OUTCOME -
DESCRIPTION

RELATED TO
WHAT LARGER
AREA OR
OBJECTIVE?
OR
OUTPUT?

RESOURCE PEOPLE

ACTIONS DONE
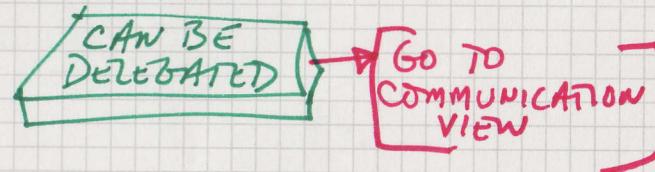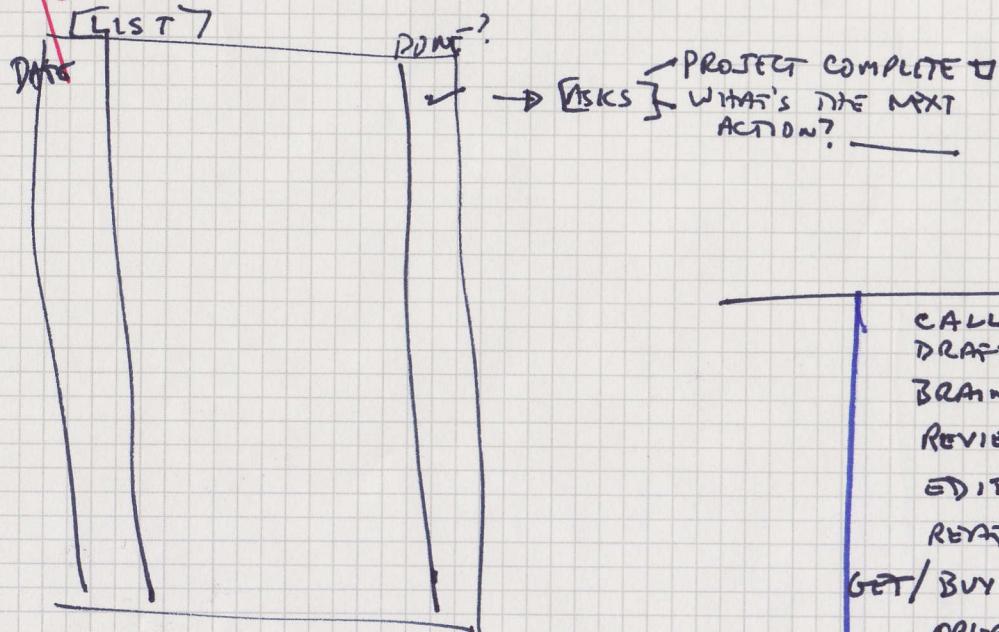
NEXT ACTION(S)

CUSTOMERS
RECIPIENTS
BENEFICIARIES

AUTO DATES ENTRIES

[LIST]

DATE   DONE?

→ [TASKS] { PROJECT COMPLETED
              WHAT'S THE NEXT
              ACTION?

CAN BE DELEGATED → GO TO COMMUNICATION VIEW

CALL...   RE:....
DRAFT...
BRAINSTORM...
REVIEW...
EDIT....
READ....
GET/BUY....   → ERRAND LIST?
ORGANIZE...
TAKE....
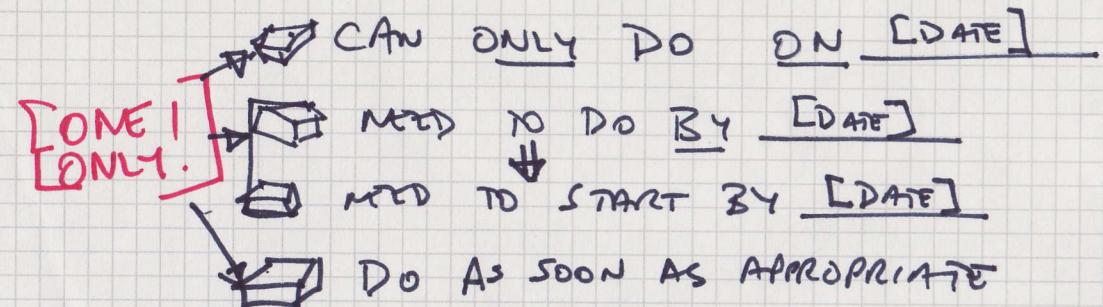
MARKET
HARDWARE
STATIONARY
CLOTHES
GIFTS
MISC. ERRANDS
WEEKEND ERRANDS
NURSERY

ANYDAY ☐
WEEKEND ☐

CAN ONLY DO ON [DATE]

[ONE! ONLY.]

NEED TO DO BY [DATE]

NEED TO START BY [DATE]

DO AS SOON AS APPROPRIATE
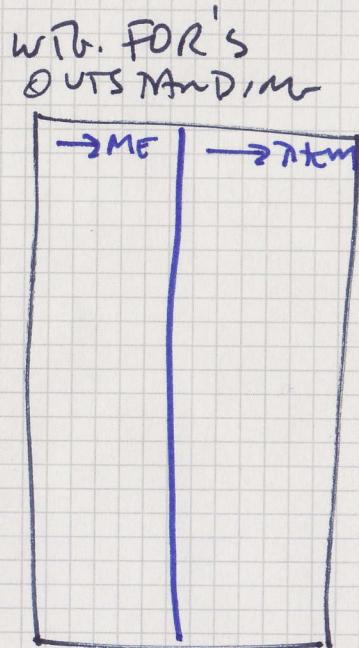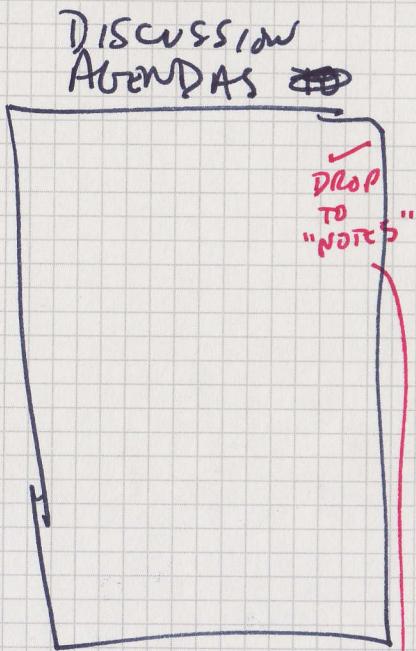
FOCUS AREA   [DEFAULT FROM PROJECT]
   [PULL-DOWN IF SINGLE ACTION]

PRINT PRIOR TO MTG. ☒

DISCUSSION AGENDAS

DROP TO "NOTES"

MTG. FOR'S OUTSTANDING

→ME   →THEM
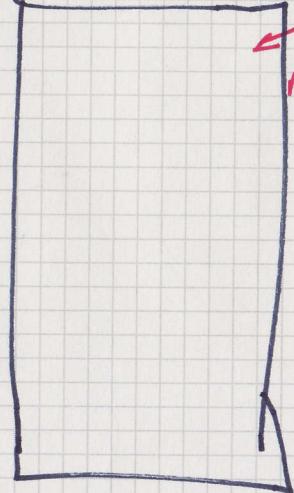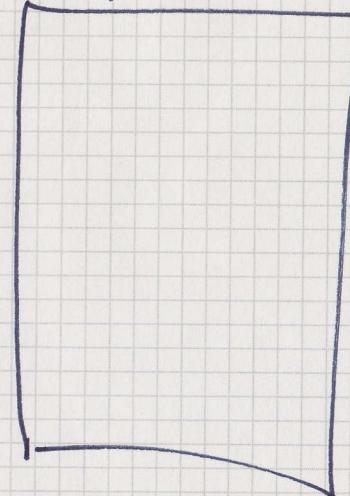
RESOURCE FOR WHAT PROJECTS/AREAS?

TIE TO PROJECTS AREAS
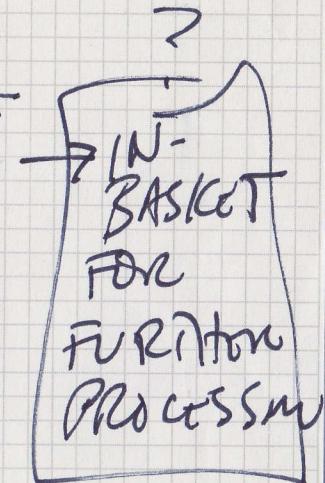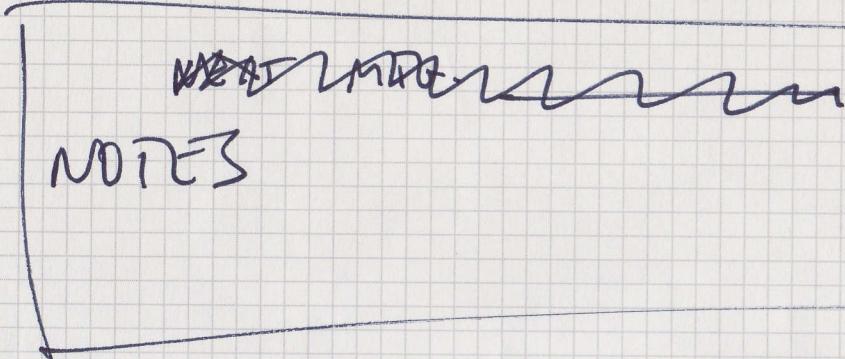
ON-GOING INTEREST POINTS

LAST MTG.

CALENDAR
SPECIAL DATES

FROM TICKLER

NOTES

?

IN-BASKET FOR FURTHER PROCESSING

design ROCA

SOMEDAY / MAYBE... SCALE: ½" =

ITEM _____

FOCUS
AREA _____

· INCLUDE IN IDEAL VISION? ☐

· BRAINSTORM? _____ MINUTES → GO TO "TOPIC DEVELOPMENT"

· REMIND/REVIEW THIS HOW?

☐ SOMEDAY LIST
(WEEKLY REVIEW)

☐ FUTURE DATE _____

☐ EVERY _____
(TICKLER)

~~BROADCASTS~~

ACTIVITY/EVENT/NOTE ─────────────────────── PERSONS
INVOLVED ──────────────
                                                                    → TIE TO
                                                                       "PERSON"
DATE ───────────── → TIE TO CALENDAR   VIEW
                         [DAY-SPECIFIC
RECUR   NOTES]
EVERY ─────────────

NOTIFY ───── DAYS AHEAD
              WEEKS
              MONTHS

✓UPCOMING ☐   OCCURRED ☐

TITLE _____

STAFF
PROJECT
COMMITTEE
OTHER
SALES

PROJECT TIE?   [LIST]

DATE _____

EXPECTED PARTICIPANTS   [LIST]

POSSIBLE/
PROPOSED AGENDAS

INFO TO GIVE

INFO TO GET

OPTION TO EXPLORE

CHOICES
DECISIONS TO MAKE

SET NEXT MTG.?

[IF "OCCURRED]

EACH   TOPIC _____
· DECISIONS
· NEXT ACTIONS
   · WHO? _____
   · WHEN? _____
      DUE DATE?
· NOTES

PROJECT TIE ☐
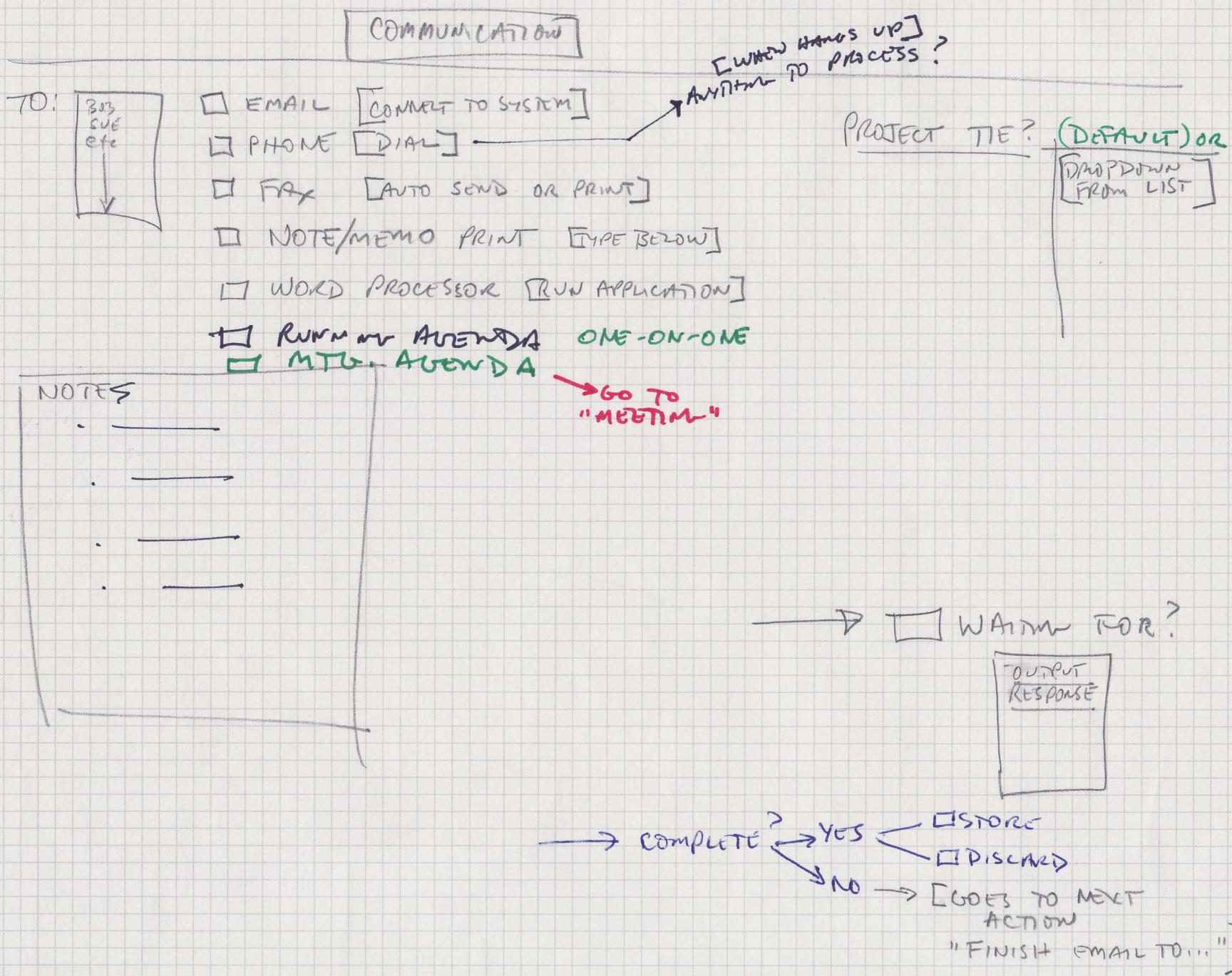
SEND TO
IN-BASKET

[PRINT TO FILL IN NOTES]

COMMUMCATION   SCALE: 1/2" =

COMMUMCATION

[WHEN HANDS UP] ?

ANYTHING TO PROCESS?

TO: 303 SUE etc

☐ EMAIL [CONNECT TO SYSTEM]

☐ PHONE [DIAL]

☐ FAX   [AUTO SEND OR PRINT]

☐ NOTE/MEMO PRINT [TYPE BELOW]

☐ WORD PROCESSOR [RUN APPLICATION]

☐ RUNNING AGENDA   ONE-ON-ONE

☐ MTG. AGENDA   → GO TO "MEETING"

PROJECT TIE? (DEFAULT) OR [DROPDOWN FROM LIST]

NOTES
- ___
- ___
- ___
- ___

→ ☐ WAITING FOR?

[OUTPUT RESPONSE]

→ COMPLETE? → YES < ☐ STORE
                      ☐ DISCARD
            → NO → [GOES TO NEXT ACTION
                   "FINISH EMAIL TO..."]

GOALS +
OBJECTIVES
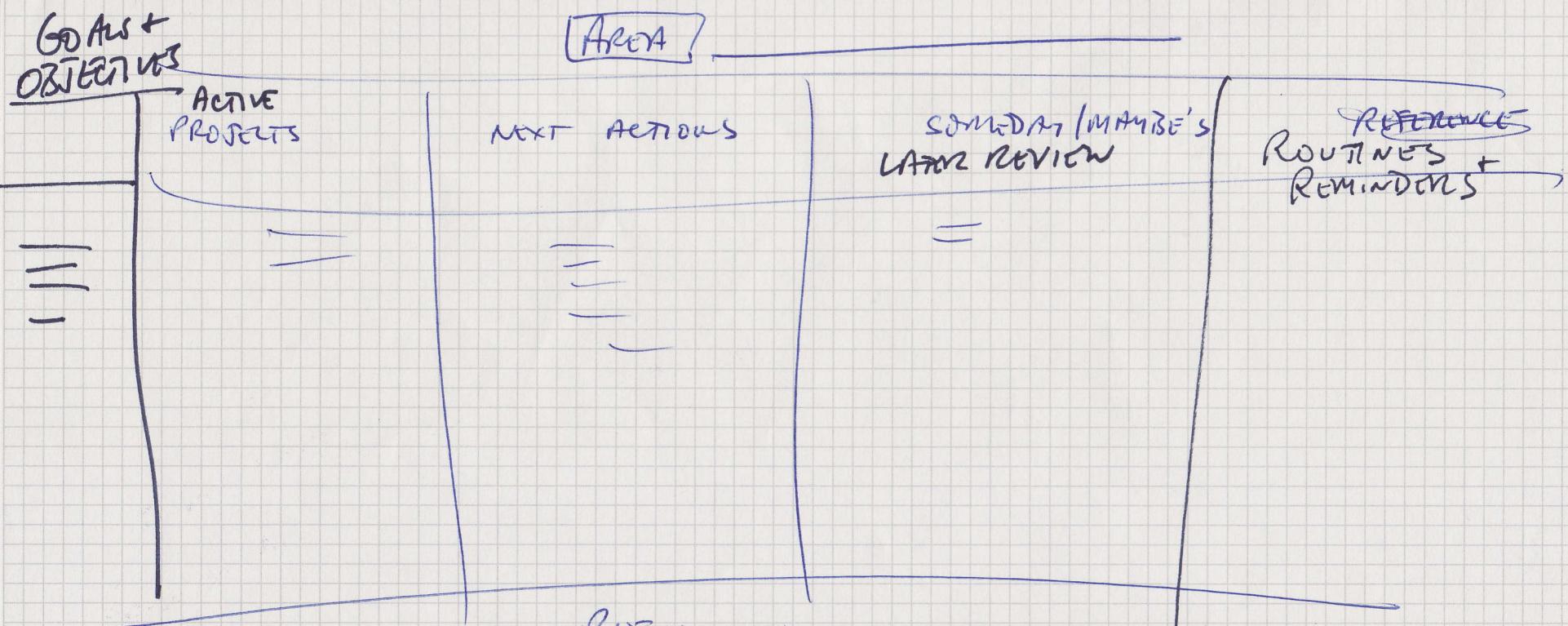
[AREA]

ACTIVE
PROJECTS

NEXT ACTIONS

SOMEDAY/MAYBE'S
LATER REVIEW

REFERENCE
ROUTINES +
REMINDERS
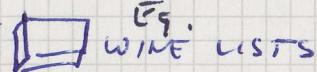
REFERENCE

LIST 1

LIST 2

RESOURCE
PEOPLE

Eg.
WINE LISTS

BOOKS RECOMMENDED
RESOURCES

BOOKS
TAPES
VIDEOS
SEMINARS
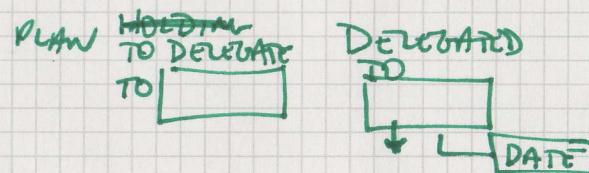
PEOPLE

SCALE: ½" =

ENTRY DATE	OUTCOME/ACTIVITY	PROJECT TITLE	FOCUS AREA	EXPECTED BY (WHOM)	DUE DATE	MUST BE STARTED BY (WHEN)	DONE (DATE)
☐	☐	☐	☐	☐	☐	☐	☐

PLAN

HOLDING TO DELEGATE TO ☐

DELEGATED TO ☐ → └ DATE

[WILL HAVE SOME FORM-DESIGN CAPABILITIES] [OR MACRO TO RUN WP APP]

CITIES/AREAS YELLOW PGS.
(ETC.)

Books
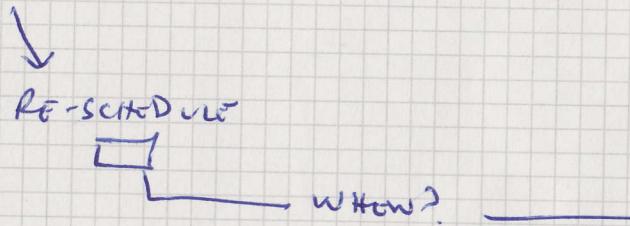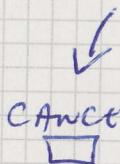
- DATA DUMP
- PROCESS IN-BASKET ← ON LINE
  DESK/BRIEFCASE CHECK
- REVIEW DAILY PAGES SINCE
     LAST DE-BRIEF
     - ADD NOTES
     - ARCHIVE

- TODAY's CALENDAR · OK?
- <u>PROJECT</u> REVIEW
     - DONE?
     - NEW TO ADD?
     - NEXT ACTION ON EACH?

- WTG. FOR REVIEW
     - REC'D?
     - NEW?
     - NEXT ACTIONS ON ANY?

- ROUTINES/RESPONSIBILITIES/CHECKLISTS

     - OK?
     - NEXT ACTIONS?
     - ADDITIONS?

- <u>UPCOMING CALENDAR</u> REVIEW

     - ADDITIONS/CHANGES?
     - PREPARATIONS REQUIRED? ACTIONS
     - DAY THEMES/LOCATIONS UPDATED?

- NEXT ACTIONS REVIEW
     - DONE?
     - NEW?
     -

- <u>FOCUS AREA</u> REVIEWS

"YOU HAVE AN ACTION RECORDED ON
YOUR CALENDAR THAT WAS NOT RECORDED AS
DONE. CALENDAR ARE FOR ITEMS THAT
EXPIRE ONLY. WE WILL MOVE THE ITEM
TO YOUR ON-GOING "NEXT ACTION" LIST, UNLESS
YOU

CANCEL ☐   RE-SCHEDULE ☐
                                    └──── WHEN? ──── ──

IN-BASKET PROCESSING

1 ITEM @ A TIME
TOP ITEM 1ST

• WHAT IS IT?
• OUTCOME REQUIRED?
    ENTER PROJECT

• NEXT ACTION?
    ENTER NEXT ACTION
    DUMP IT
    DO IT (< 2 MIN) ← FINISH
                        COMMUNICATE
                        ROUTE
    DELEGATE IT
        GO: COMMUNICATION

    DEFER IT
        ENTER: NEXT ACTION

    THEN   INPUT
    STORE PARTICLE AS
    REFERENCE, OR TOSS.

→→ LIKE POST-IT ON SCREEN
   FOR PROCESSING EMAIL

→→ ☐→ ON INITIAL SCREEN FOR
      PROCESSING PAPER