

Do ad hoc work as it shows up, not because it is the path of least resistance, but because it is the thing you need to do, vis-a-vis all the rest.

on a conference call. But you must learn to dance among many tasks to keep a healthy balance of your workflow. Your choices will still have to be calibrated against your own clarity about the nature and goals of your work.

Your ability to deal with surprise is your competitive edge. But at a certain point, if you're not catching up and getting things under control, staying busy with only the work at hand will undermine your effectiveness. And ultimately, in order to know whether you should stop what you're doing and do something else, you'll need to have a good sense of what your job requires and how that fits into the other contexts of your life. The only way you can have that is to evaluate your life and work appropriately at multiple horizons.

The Six-Level Model for Reviewing Your Own Work

The six levels of work as we saw in chapter 2 (pages 51-53) may be thought of in terms of altitude:

- 50,000+feet: Life
- 40,000 feet: Three- to five-year visions
- 30,000 feet: One- to two-year goals
- 20,000 feet: Areas of responsibility
- 10,000 feet: Current projects
- Runway: Current actions

It makes sense that each of these levels should enhance and align with the ones above it. In other words, your priorities will sit in a hierarchy from the top down. Ultimately, if the phone call you're supposed to make clashes with your life purpose or values, to be in sync with yourself you won't make it. If your job structure

doesn't match up with where you need to be a year from now, you should rethink how you've framed your areas of focus and responsibilities, if you want to get where you're going most efficiently.

Let's look at that first example from the bottom up. The phone call you need to make (action) is about the deal you're working on (project), which would increase sales (responsibility). This particular deal would give you the opportunity to move up in the sales force (job goal) because of the new market your company wants to penetrate (organization vision). *Your work is to* And that would get you closer to the way you want to *discover your work* be living, both financially and professionally (life). *and then with all*

Or, from the other direction, you've decided *your heart to give* that you want to be your own boss and unlock some of *yourself to it.* your unique assets and talents in a particular area that — resonates with you (life). So you create a business for yourself (vision), with some short-term key operational objectives (job goal). That gives you some critical roles you need to fulfill to get it rolling (responsibility), with some immediate outcomes to achieve (projects). On each of those projects you'll have things you need to do, as soon as you can do them (next actions).

The healthiest approach for relaxed control and inspired productivity is to manage all the levels in a balanced fashion. At any of these levels, it's critical to identify all the open loops, all the incompletions, and all the commitments that you have right now, as best you can. Without an acceptance and an objective assessment of what's true in the present, it's always difficult to cast off for new shores. What's on your answering machine? What are your projects relative to your kids? What are you responsible for in the office? What's pushing on you to change or attracting you to create in the next months or years? These are all open loops in your psyche, though often it takes deeper and more introspective processes to identify the bigger goals and subtler inclinations.

There is magic in being in the present in your life. I'm always

*The best place to
succeed is where
you are with what
you have.*

—Charles

amazed at the power of clear observation simply about what's going on, what's true. Finding out the exact details of your personal finances, clarifying the historical data about the company you're buying, or getting the facts about who really said what to whom in an interpersonal conflict can be constructive, if not downright healing.

Getting things done, and feeling good about it, means being willing to recognize, acknowledge, and appropriately manage all the things that have your consciousness engaged. Mastering the art of stress-free productivity requires it.

Working from the Bottom Up

In order to create productive alignment in your life, you could quite reasonably start with a clarification from the top down. Decide why you're on the planet. Figure out what kind of life and work and life-style would best allow you to fulfill that contract. What kind of job and personal relationships would support that direction? What key things would you need to put in place and make happen right now, and what could you do physically as soon as possible, to kick-start each of those?

You're never lacking in opportunities to clarify your priorities at any level. Pay attention to which horizon is calling you.

In truth, you can approach your priorities from any level, at any time. I always have something that I could do constructively to enhance my awareness and focus on each level. I'm never lacking in more visions to elaborate, goals to reassess, projects to identify or create, or actions to decide on. The trick is to learn to pay attention to the ones you need to at the appropriate time, to keep you and your systems in balance.

Because everything will ultimately be driven by the priorities of the level above it, any formulation of your priorities would obviously most efficiently begin at the top. For example, if you spend time prioritizing your work and then later discover that it's not the work you think you ought to be doing, you may have "wasted" time and energy that could have been better spent defin-

ing the next job you really want. The problem is that without a sense of control at the implementation levels (current projects and actions), and without inner trust in your own ability to manage those levels appropriately, trying to manage yourself from the top down often creates frustration.

From a practical perspective, I suggest going ^{Trying to manage} from the bottom up instead. I've coached people ^{from the top down,} from both directions, and in terms of lasting value, I ^{when the bottom is} can honestly say that getting someone in control of ^{out of control, may} the details of his or her current physical world, and ^{be the *least*} then elevating the focus from there, has never ^{effective approach.} missed.

The primary reason to work from this bottom-up direction is that it clears the psychic decks to begin with, allowing your creative attention to focus on the more meaningful and elusive visions that you may need to challenge yourself to identify. Also, this particular method has a high degree of flexibility and freedom, and it includes a thinking and organizing practice that is universal and effective no matter what it's focused on. That makes it worth learning, no matter what the actual content you're dealing with at the moment may be. Change your mind, and this process will help you adjust with maximum speed. And knowing that you have that ability will give you permission to play a bigger game. It's truly empowering.

While the "50,000-foot level" is obviously the most important context within which to set priorities, experience has shown me that when we understand and implement *all* the levels of work in which we are engaged, especially the runway and 10,000-foot levels, we gain greater freedom and resources to do the bigger work that we're all about. Although a bottom-up approach is not a key conceptual priority, from a practical perspective it's a critical factor in achieving a balanced, productive, and comfortable life.

Runway The first thing to do is make sure your action lists are complete, which in itself can be quite a task. Those who focus on gathering and objectifying all of those items discover that there are many they've forgotten, misplaced, or just not recognized.

Aside from your calendar, if you don't have at least fifty next actions and waiting-fors, including all the agendas for people and meetings, I would be skeptical about whether you really had *all* of them. If you've followed through rigorously with the steps and suggestions in part 2, though, you may have them already. If not, and you do want to get this level up-to-date, set aside some time to work through chapters 4 through 6 in real implementation mode.

When you've finished getting this level of control current, you'll automatically have a more grounded sense of immediate priorities, which is almost impossible to achieve otherwise.

Taking the inventory of your current work at all levels will automatically produce greater focus, alignment, and sense of priorities.

10,000 Feet Finalize your "Projects" list. Does it truly capture all the commitments you have that will require more than one action to get done? That will define the boundaries of the kind of week-to-week operational world you're in and allow you to relax your thinking for longer intervals.

If you make a complete list of all of the things you want to have happen in your life and work at this level, you'll discover that there are actions you need to do that you hadn't realized. Just creating this objective inventory will give you a firmer basis on which to make decisions about what to do when you have discretionary time. Invariably when people get their "Projects" list up-to-date, they discover there are several things that could be done readily to move things they care about forward.

Very few people have this clear data defined and available to themselves in some objective form. Before any discussion about what should be done this afternoon can take place, this information must be at hand.

Again, if you've been putting into practice the methodology of *Getting Things Done*, your "Projects" list will be where it needs to be. For most of our coaching clients, it takes ten to fifteen hours of collecting, processing, and organizing to get to the point of trusting the thoroughness of their inventory.

20,000 Feet This is the level of "current job responsibilities." What are the "hats" you wear? Professionally, this would relate to your current position and work. Personally, it would include the roles you've taken on in your family, in your community, and of course with yourself as a functioning person.

You may have some of these roles already defined and written out. If you've recently taken a new position and there's an agreement or contract about your areas of responsibility, that would certainly be a good start. If you've done any kind of personal goal-setting and values-clarifying exercises in the past and still have any materials you created then, add those to the mix.

Next I recommend that you make and keep a list called "Areas of Focus." You might like to separate this into "Professional" and "Personal" sublists, in which case you'll want to use them both equally for a consistent review. This is one of the most useful checklists you can create for your own self-management. It won't require the kind of once-a-week recalibration that the "Projects" list will; more likely it will have meaning on a longer recursion cycle. Depending on the speed of change in some of the more important areas of your life and work, this should be used as a trigger for potential new projects every one to three months.

You probably have somewhere between four and seven key areas of responsibility in your work, and a similar number personally. Your job may include things like staff development, systems design, long-range planning, administrative support, marketing, and scheduling, or responsibility for facilities, fulfillment, quality

control, asset management, and so on. If you're your own business, your attention will be on many more areas than if you have a very specialized function in a large organization. The rest of your life might entail areas of focus such as parenting, partnering, church, health, community service, home management, financial management, self-development, creative expression, and so forth.

The operational purpose of the "Areas of Focus" list is to ensure that you have all your projects and next actions defined, so you can manage your responsibilities appropriately. If you were to create an accounting of those and evaluate them objectively, in terms of what you're doing and should be doing, you'll undoubtedly uncover projects you need to add to your "Projects" list. You may, in reviewing the list, decide that some areas are just fine and are being taken care of. Then again, you may realize that something has been "bugging" you in one area and that a project should be created to shore it up. "Areas of Focus" is really just a more abstract and refined version of the "Triggers" list we covered earlier.

Every client I have coached in the last twenty years has uncovered at least one important gap at this level of discussion. For instance, a common "hat" a manager or executive wears is "staff development." Upon reflection, most realize they need to add a project or two in that area, such as "Upgrade our performance-review process."

A discussion of "priorities" would have to incorporate all of these levels of current agreements between yourself and others. If you get this "job description" checklist in play and keep it current, you'll probably be more relaxed and in control than most people in our culture. It will certainly go a long way toward moving you from hope to trust as you make the necessary on-the-run choices about what to do.

30,000 to 50,000+ Feet Whereas the three lower levels have mostly to do with the current state of things—your actions, projects, and areas of responsibility—from here up the factors of the future and your direction and intentions are primary. There is still

an inventory to take at these plateaus, but it's more about "What is true right now about where I've decided I'm going and how I'm going to get there?" This can range from one-year goals in your job ("30,000 feet") to a three-year vision for your career and personal net worth ("40,000 feet") to intuiting your life purpose and how to maximize its expression ("50,000+ feet").

When you're not sure where you're going, you'll never know when enough is enough.

I'm blending the three uppermost levels together here because situations often can't easily be pigeonholed into one or another of these categories. Also, since *Getting Things Done* is more about the art of implementation than about how to define goals and vision, I won't offer a rigorous examination here. But by its very nature this investigation can broach potentially deep and complex arenas, which could include business strategy, organization development, career planning, and life direction and values.

For our purposes, the focus is on capturing what motivators exist for you in current reality that determine the inventory of what your work actually is, right now. Whether your directions and goals should be changed—based on deeper thinking, analysis, and intuition—could be another discussion. Even so, there are probably some things you can identify right now that can help you get current in your own thinking about your work and what's important in it.

If you were to intuitively frame a picture of what you think you might be doing twelve to eighteen months from now, or what the nature of your job will look like at that point, what would that trigger? At this level, which is subtler, there may be things personally you need to let go of, and people and systems that may need to be developed to allow the transition. And as the job itself is a moving target, given the shifting sands of the professional world these days, there may need to be projects defined to ensure viability of the outputs in your area.

In the personal arena, this is where you would want to consider things like: "My career is going to stagnate unless I assert my

own goals more specifically to my boss (or my boss's boss)." Or "What new things are my children going to be doing next year, and what do I need to do differently because of that?" Or "What preparation do I need to ensure that I can deal with this health problem we've just uncovered?"

Through a longer scope you might assess: How is your career going? How is your personal life moving along? What is your organization doing relative to changes in the environment, and what impact does that have on you? These are the one-to-five-year-horizon questions that, when I ask them, elicit different and important kinds of answers from everyone.

Not long ago I coached someone in a large international bank who, after a few months of implementing this methodology and getting control of his day-to-day inventory of work, decided the time was right to invest in his own start-up high-tech firm. The thought had been too intimidating for him to address initially, but working from the "runway level" up made it much more accessible and a natural consequence of thinking at this horizon.

If you're involved in anything that has a future of longer than a year (marriage, kids, a career, a company, an art form), you would do well to think about what you might need to be doing to manage things along that vector.

Questions to ask yourself here are:

- What are the longer-term goals and objectives in my organization, and what projects do I need to have in place related to them to fulfill my responsibilities?
- What longer-term goals and objectives have I set for myself, and what projects do I need to have in place to make them happen?
- What other significant things are happening that could affect my options about what you I'm doing?

Here are some examples of the kinds of issues that show up at this level of conversation:

- The changing nature of your job, given the shifting priorities of the company. Instead of managing the production of your own training programs in-house, you're going to outsource them to vendors.
- The direction in which you feel you need to move in your career. You see yourself doing a different kind of job a year from now, and you need to make a transition out of the one you have while exploring the options for a transfer or promotion.
- The organization direction, given globalization and expansion. You see a lot of major international travel looming on the horizon for you, and given your life-style preferences, you need to consider how to readjust your career plans.
- Life-style preferences and changing needs. As your kids get older, your need to be at home with them is diminishing, and your interest in investment and retirement planning is growing.

At the topmost level of thinking, you'll need to ask some of the ultimate questions. Why does your company exist? Why do *you* exist? What is the core DNA of your existence, personally and/or organizationally, that drives your choices. This is the "big picture" stuff with which hundreds of books and gurus and models are devoted to helping you grapple.

"Why?": this is the great question with which we all struggle.

You can have all the other levels of your life and work shipshape, defined, and organized to a T. Still, if you're the slightest bit off course in terms of what at the deepest level you want or are called to be doing, you're going to be uncomfortable.

Getting Priority Thinking Off Your Mind

Take at least a few minutes, if you haven't already done so, to jot down some informal notes about things that occurred to you while you've been reading this chapter. Whatever popped into your mind at these more elevated levels of your inner radar, write it down and get it out of your head.

Then process those notes. Decide whether what you wrote down is something you really want to move on or not. If not, throw the note away, or put it on a "Someday/Maybe" list or in a folder called "Dreams and Goals I Might Get Around to at Some Point." Perhaps you want to continue accumulating more of this kind of future thinking and would like to do the exercise with more formality—for example, by drafting a new business plan with your partners, designing and writing out your idea of a dream life with your spouse, creating a more specific career map for the next three years for yourself, or just getting a personal coach who can lead you through those discussions and thought processes. If so, put that outcome on your "Projects" list, and decide the next action. Then do it, hand it off to get done, or put the action reminder on the appropriate list.

With that done, you may want to turn your focus to developmental thinking about specific projects that have been identified but not fleshed out as fully as you'd like. You'll want to ensure that you're set up for that kind of "vertical" processing.

Getting Projects Under Control

CHAPTERS 4 THROUGH 9 have given you all the tricks and methods you need to clear your head and make intuitive choices about what to do when. That's the horizontal level—what needs your attention and action across the horizontal landscape of your life. The last piece of the puzzle is the vertical level—the digging deep and pie-in-the-sky thinking that can leverage your creative brainpower. That gets us back to refining and energizing our project planning.

The Need for More Informal Planning

After years of working with thousands of professionals down in the trenches, I can safely say that virtually all of us could be doing more planning, more informally and more often, about our projects and our lives. And if we did, it would relieve a lot of pressure on our psyches and produce an enormous amount of creative output with minimal effort.

I've discovered that the biggest improvement opportunity in planning does not consist of techniques for the highly elaborate and complex kinds of project organizing that professional project managers sometimes use (like GANTT charts). Most of the people who need those already have them, or at least have access to the training and software required to learn about them. The real need is to capture and utilize more of the creative, proactive thinking we do—or *could* do.