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Organizing: Setting Up the Right Buckets

HAVING A TOTAL and seamless system of organization in place gives you tremendous power because it allows your mind to let go of lower-level thinking and graduate to intuitive focusing, undistracted by matters that haven't been dealt with appropriately. But your physical organization system must be better than your mental one in order for that to happen.

Airtight organization is required for your focus to remain on the broader horizon.

In this chapter I'll lead you through the organizing steps and tools that will be required as you process your in-basket. As you initially process "in," you'll create lists and groupings of things you want to organize and you'll invariably think of additional items to include. In other words, your organization system is not something that you'll necessarily create all at once, in a vacuum. It will evolve as you process your stuff and test out whether you have put everything in the best place for *you.*

I got it all together, but I forgot where I put it.

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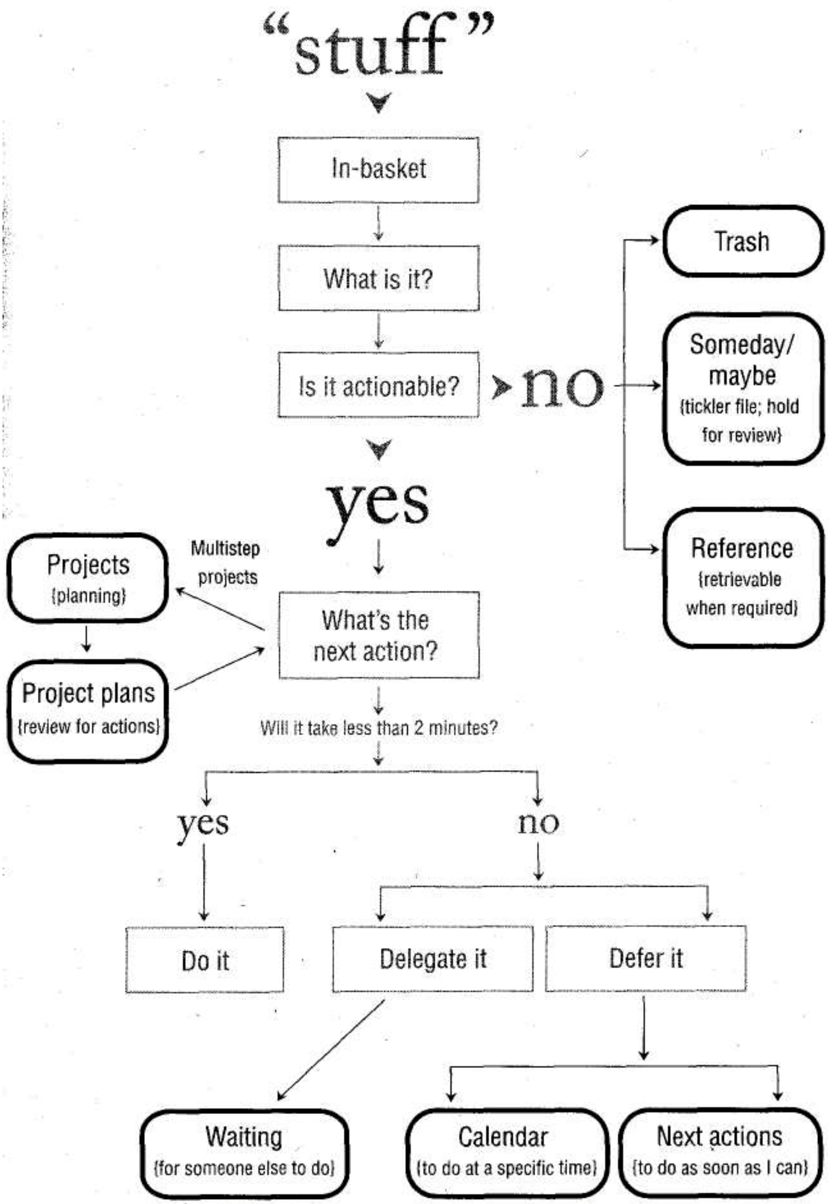
The outer ring of the Workflow Diagram (opposite) shows the main groupings into which things will go as you decide what they are and what needs to be done about them.



WORKFLOW DIAGRAM—ORGANIZING

The Basic Categories

There are seven primary *types* of things that you'll want to keep track of and manage from an organizational perspective:

- A "Projects" list
- Project support material
- Calendared actions and information
- "Next Actions" lists
- A "Waiting For" list
- Reference material
- A "Someday/Maybe" list

The Importance of Hard Edges

It's critical that all of these categories be kept pristinely distinct from one another. They each represent a discrete type of agreement we make with ourselves, and if they lose their edges and begin to blend, much of the value of organizing will be lost.

The categories must be kept visually, physically, and psychologically separate.

If you put reference materials in the same pile as things you still want to read, for example, you'll go numb to the stack. If you put items on your "Next Actions" lists that really need to go on the calendar, because they have to occur on specific days, then you won't trust your calendar and you'll continually have to reassess your action lists. If you have a project that you're not going to be doing anything about for some time, it must go onto your "Someday/Maybe" list so you can relate to the "Projects" list with the rigorous action-generating focus it needs. And if something you're "Waiting For" is included on one of your action lists, you'll continually get bogged down by nonproductive rethinking.

All You Really Need Is Lists and Folders

Once you know *what* you need to keep track of (covered in the previous chapter, on *Processing),* all you really need is lists and folders for reference and support materials. Your lists (which, as I've indicated, could also be items in folders) will keep track of projects and someday/maybes, as well as the actions you'll need to take on your active open loops. Folders (digital or paper-based) will be required to hold your reference material and the support information for active projects.

/ would not give a fig for the simplicity on this side of complexity, but I would give my life for the simplicity on the other side of complexity.
—Oliver Wendell Holmes

Lots of people have been making lists for years but have never found the procedure to be particularly effective. There's rampant skepticism about systems as simple as the one I'm recommending. But most list-makers haven't put the appropriate things on their lists, or have left them incomplete, which has kept the lists themselves from being very functional. Once you know what goes *on* the lists, however, things get much easier; then you just need a way to manage them.

As I've said, you shouldn't bother to create some external structuring of the priorities on your lists that you'll then have to rearrange or rewrite as things change. Attempting to impose such scaffolding has been a big source of frustration in many people's organizing. You'll be prioritizing more intuitively as you see the whole list, against quite a number of shifting variables. The list is just a way for you to keep track of the total inventory of active things to which you have made a commitment, and to have that inventory available for review.

When I refer to a "list," keep in mind that I mean nothing more than a grouping of items with some similar characteristic. A list could look like one of three things: (1) a file folder with separate paper notes for the items within the category; (2) an actual list on a titled piece of paper (often within a loose-leaf organizer or planner); or (3) an inventory in a software program or on a digital assistant, such as Microsoft Outlook task categories or a category on a handheld PDA.

Organizing Action Reminders

If you've emptied your in-basket, you'll undoubtedly have created a stack of "Pending" reminders for yourself, representing longer-than-two-minute actions that cannot be delegated to someone else. You'll probably have anywhere from twenty to sixty or seventy or more such items. You'll also have accumulated reminders of things that you've handed off to other people, and perhaps some things that need be placed in your calendar or a "Someday/ Maybe" kind of holder.

You'll want to sort all of this into groupings that make sense to you so you can review them as options for work to do when you have time. You'll also want to decide on the most appropriate way physically to organize those groups, whether as items in folders or on lists, either paper-based or digital.

The Actions That Go on Your Calendar

For the purposes of organization, as I've said, there are two basic kinds of actions: those that must be done on a certain day and/or at a particular time, and those that just need to be done as soon as you can get to them, around your other calendared items. Calendared action items can be either time-specific (e.g., "4:00—5:00 meet with Jim") or day-specific ("Call Rachel Tuesday to see if she got the proposal").

As you were processing your in-basket, you probably came across things that you put right into your calendar as they showed up. You may have realized that the next action on getting a medical checkup, for example, was to call and make the appointment, and so (since the action required two minutes or less) you actually did it when it occurred to you. Writing the appointment into your calendar as you made it would then have been common sense.

The calendar should show only the "hard landscape" around which you do the rest of your actions.

What many people *want* to do, however, based on old habits of writing daily to-do lists, is put actions on the calendar that they think they'd really *like* to get done next Monday, say, but that then actually might not, and that might then have to be taken over to following days. *Resist this impulse.* You need to trust your calendar as sacred territory, reflecting the exact hard edges of your day's commitments, which should be noticeable at a glance while you're on the run. That'll be much easier if the only things in there are those that you absolutely *have* to get done on that day. When the calendar is relegated to its proper role in organizing, the majority of the actions that you need to do are left in the category of "as soon as possible, against all the other things I have to do."

Organizing As-Soon-As-Possible Actions by Context

Over many years I have discovered that the best way to be reminded of an "as soon as I can" action is by the particular *context* required for that action—that is, either the tool or the location or the person needed to complete it. For instance, if the action requires a computer, it should go on an "At Computer" list. If your action demands that you be out in your car driving around (such as stopping by the bank or going to the hardware store), the "Errands" list would be the appropriate place to track it. If the next step is to talk about something face-to-face with your partner Emily, putting it into an "Emily" folder or list makes the most sense.

How discrete these categories will need to be will depend on (1) how many actions you actually have to track; and (2) how often you change the contexts within which to do them.

If you are that rare person who has only twenty-five next actions, a single "Next Actions" list might suffice. It could include items as diverse as "Buy nails" and "Talk to boss about staff changes" and "Draft ideas about off-site meeting." If, however, you have fifty or a hundred next actions pending, keeping all of those on one big list would make it too difficult to see what you needed to see; each time you got any window of time to do something, you'd have to do unproductive resorting. If you happened to be on a short break at a conference, during which you might be able to make some calls, you'd have to identify the items that were calls among a big batch of unrelated items. When you went out to do odds and ends, you'd probably want to pick out your errands and make another list.

Another productivity factor that this kind of organization supports is leveraging your energy when you're in a certain mode. When you're in "phone mode," it helps to make a lot of phone calls—just crank down your "Calls" list. When your computer is up and running and you're cruising along digitally, it's useful to get as much done on-line as you can without having to shift into another kind of activity. It takes more energy than most people realize to unhook out of one set of behaviors and get into another kind of rhythm and tool set. And obviously, when a key person is sitting in front of you in your office, you'd be wise to have all the things you need to talk about with him or her immediately at hand.

The Most Common Categories of Action Reminders

You'll probably find that at least a few of the following common list headings for next actions will make sense for you:

- "Calls"
- "At Computer"
- "Errand's"
- "Office Actions" or "At Office" (miscellaneous)
- "At Home"
- "Agendas" (for people and meetings)
- "Read/Review"

"Calls" This is the list of all the phone calls you need to make; you can work off it as long as you have a phone available. The more mobile you are (especially if you have a cell phone), the more useful you'll find it to have one single list of all your calls: those strange little windows of time that you wind up with when you're off-site or traveling—on a break or waiting for a plane, maybe—offer a perfect opportunity to work down your list. Hav-

ing a discrete "Calls" list makes it much easier to focus and intuitively pick the best call to make in the moment.

I -suggest that you take the time to write the phone number itself alongside each item. There are many situations in which you would probably make the call if the number was already there in front of you but not if you had to look it up.

"At Computer" If you work with a computer—particularly if you move around with a laptop or have a PC at work and another one at home—it can be helpful to group all those actions that you need to do when it's on and running. This will allow you to see all your options for computer work to do, reminding you of all the e-mails you need to send, the documents you need to draft or edit, and so on.

Because I fly a lot, I even maintain an "Online" action list, separate from my "At Computer" one. When I'm on a plane, I can't easily connect to the Web or to my server, as many actions require. So instead of having to rethink what I can and can't do whenever I look at my "At Computer" list, I can trust that none of my "At Computer" actions require that I be connected, which frees my mind to make choices based on other criteria.

Think carefully about *where* and *howyou* can and can't do *which* actions, and organize your lists accordingly.

If you have a computer only at work, you may not need a separate "At Computer" list; "Office Actions" may cover those actions because the office is the only place you can do them anyway. (Similarly, if you have a computer only at home, and it's not a laptop, you may be able to put computer-specific actions on your "At Home" list.)

"Errands" It makes a lot of sense to group together in one place reminders of all the things you need to do when you're "out and about." When you know you need to get in your car and go somewhere, it's great to be able to look at the list while you're on the road. Actions like "Get stock certificates from safety-deposit box,"

"Pick up pictures at framers," and "Buy petunias at nursery" would all go here.

This list could, of course, be nothing more elaborate than a Post-it that you keep in your planner somewhere, or a screen in an "Errands" category of the "To Do" section on your Palm organizer.

It's often helpful to track sublists within individual "Errands" items. For instance, as soon as you realize you need something from the hardware store, you might want to make "Hardware Store" the list item and then append a sublist of all the things you want to pick up there, as you think of them. On the low-tech end, you could create a "Hardware Store" Post-it; on the high-tech side, if you were using a digital list, you could attach a "note" to "Hardware Store" on your list and input the details there.

We must strive to reach that simplicity that lies beyond sophistication.
—-John Gardner

Because I travel in major metropolitan areas so much, I keep *two* "Errands" lists—"Errands—Ojai" (where I live) and "Errands—Anywhere," for all those other things I can pick up even when I'm on the road. "T-connectors for irrigation" would go on "Errands—Ojai," but "Get dress socks" would go on "Errands—Anywhere."

"Office Actions'/"At Office" If you work in an office, there will be certain things that you can do only there, and a list of those will be a useful thing to have in front of you then—though obviously, if you have a phone and a computer in your office, and you have "Calls" and "At Computer" as separate lists, *they'll* be in play as well. I'd use an "Office Actions" or "At Office" list for anything that required an Internet connection available only, or even most conveniently, in the office—for example, a reminder to download a large software program from the Web would go on this list for me.

"At Home" Many actions can be done only at home, and it makes sense to keep a list specific to that context. I'm sure you've got numerous personal and around-the-house projects, and often the

next thing to do *on* them is just to *do* them. "Hang new print," "Organize CDs," and "Switch closets to winter clothes" would be typical items for this grouping.

If you have an office at home, as I do, anything that can be done only there goes on the "At Home" list. (If you work *only* at home and don't go to another office, you won't need an "Office Actions" list at all—the "At Home" list will suffice.)

"Agendas" Invariably you'll find that many of your next actions need to either occur in a real-time interaction with someone or be brought up in a committee, team, or staff meeting. You have to talk to your partner about an idea for next year; you want to check with your spouse about his schedule for the spring; you need to delegate a task to your secretary that's too complicated to explain in an e-mail. And you must make an announcement at the Monday staff meeting about the change in expense-report policies.

Standing meetings and people you deal with on an ongoing basis may need their own "Agenda" lists.

These next actions should be put on separate "Agenda" lists for each of those people and for that meeting (assuming that you attend it regularly). Professionals who keep a file folder to hold all the things they need to go over with their boss already use a version of this method. If you're conscientious about determining all your next actions, though, you may find that you'll need somewhere between three and fifteen of these kinds of lists. I recommend that separate files or lists be kept for bosses, partners, assistants, spouses, and children. You should also keep the same kind of list for your attorney, financial adviser, accountant, and/or computer consultant, as well as for anyone else with whom you might have more than one thing to go over the next time you talk on the phone.

If you participate in standing meetings—staff meetings, project meetings, board meetings, committee meetings, whatever—they, too, deserve their own files, in which you can collect things that will need to be addressed on those occasions.

Often you'll want to keep a running list of things to go over with someone you'll be interacting with only for a limited period of time. For instance, if you have a contractor doing a significant piece of work on your house or property, you can create a list for him for the duration of the project. As you're walking around the site after he's left for the day, you may notice several things you need to talk with him about, and you'll want that list to be easy to capture and to access as needed.

Given the usefulness of this type of list, your system should allow you to add "Agendas" ad hoc, as needed, quickly and simply. For example, inserting a page for a person or a meeting within an "Agenda" section in a loose-leaf notebook planner takes only seconds, as does adding a dedicated "Memo" in a PDA's "Agenda" category.

"Read/Review" You will no doubt have discovered in your in-basket a number of things for which your next action is to *read.* I hope you will have held to the two-minute rule and dispatched a number of those quick-skim items already—tossing, filing, or routing them forward as appropriate.

To-read items that you know will demand more than two minutes of your time are usually best managed in a separate physical stack-basket labeled "Read/Review." This is still a "list" by my definition, but one that's more efficiently dealt with by grouping the documents and magazines themselves in a tray and/or portable folder.

For many people, the "Read/Review" stack can get quite large. That's why it's critical that the pile be reserved only for those longer-than-two-minute things that you actually *want to read when you have time.* That can be daunting enough in itself, but things get *seriously* out of control and psychologically numbing when the edges of this category are not clearly defined. A pristine delineation will at least make you conscious of the inventory, and if you're like most people, having some type of self-regulating mechanism will help you become more aware of what you want to keep and what you should just get rid of.

It's practical to have that stack of reading material at hand and easy to grab on the run when you're on your way to a meeting that may be late starting, a seminar that may have a window of time when nothing is going on, or a dentist appointment that may keep you waiting to get your teeth cleaned. Those are all great opportunities to crank through that kind of reading. People who don't have their "Read/Review" material organized can waste a lot of time, since life is full of weird little windows when it could be processed.

Those who make the worst use of their time are the first to complain of its shortness.

—Jean de

Organizing "Waiting For"

Like reminders of the actions *you* need to do, reminders of all the things that you're waiting to get back from or get done by others have to be sorted and grouped. You won't necessarily be tracking discrete action steps here, but more often final deliverables or projects that others are responsible for, such as the tickets you've ordered from the theater, the scanner that's coming for the office, the OK on the proposal from your client, and so on. When the next action on something is up to someone else, you don't need an *action* reminder, just a trigger about what you're waiting for from whom. Your role is to review that list as often as you need to and assess whether you ought to be *taking* an action such as checking the status or lighting a fire under the project.

You'll probably find it works best to keep this "Waiting For" list close at hand, in the same system as your own "Next Actions" reminder lists. The responsibility for the next step may bounce back and forth many times before a project is finished. For example, you may need to make a call to a vendor to request a proposal for a piece of work (on your "Calls" list.) Having made the call, you then wait for the vendor to get back to you with the proposal (the proposal goes to your "Waiting For" list). When the proposal comes in, you have to review it (it lands in your "Read/Review" stack-basket). Once you've gone over it, you send it to your boss for her approval (now it's back on your "Waiting For" list). And so on.*

You'll get a great feeling when you know that your "Waiting For" list is the complete inventory of everything you care about that other people are supposed to be doing.

Using the Original Item as Its Own Action Reminder

The most efficient way to track your action reminders is to add them to lists or folders as they occur to you. The originating trigger won't be needed after you have processed it. You might take notes in the meeting with your boss, but you can toss those after you've pulled out any projects and actions associated with them. While some people try to archive voice-mails that they still need to "do something about," that's not the most effective way to manage the reminders embedded in them.

Keep actionable e-mails and paper separated from all the rest.

There are some exceptions to this rule, however. Certain kinds of input will most efficiently serve as their own reminders of required actions, rather than your having to write something about them on a list. This is particularly true for some paper-based materials and some e-mails.

Managing Paper-Based Workflow

Some things are their own best reminders of work to be done. The category of "Read/Review" articles, publications, and documents is the most common example. It would obviously be overkill to write "Review *Fortune* magazine" on some action list when you could just as easily toss the magazine itself into your "Read/Review" basket to act as the trigger.

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*Digital list managers (like the Palm's) or low-tech papers in separate folders have an advantage, here over lists on paper because they let you easily move an item from one category to another as the action changes, without your having to rewrite anything.

Another example: people who find it easier to deal with bills by paying them all at one time and in one location will want to keep their bills in a folder or stack-basket labeled "Bills to Pay" (or, more generically, "Financial to Process"). Similarly, receipts for expense reporting should be either dealt with at the time they're generated or kept in their own "Receipts to Process" envelope or folder.*

The specific nature of your work, your input, and your workstation may make it more efficient to organize other categories using only the original paper itself. A customer-service professional, for instance, may deal with numerous requests that show up in a standard written form, and in that case maintaining a basket or file containing only those actionable items is the best way to manage them.

Whether it makes more sense to write reminders on a list or to use the originating documents in a basket or folder will depend to a great extent on logistics. Could you use those reminders somewhere other than at your desk? If so, the portability of the material should be considered. If you couldn't possibly *do* that work anywhere but at your desk, then managing reminders of it solely at your workstation is the better choice.

Whichever option you select, the reminders should be in visibly discrete categories based upon the next action required. If the next action on a service order is to make a call, it should be in a "Calls" group; if the action step is to review information and input it into the computer, it should be labeled "At Computer." Most undermining of the effectiveness of many workflow systems I see is the fact that all the documents of one type (e.g., service requests) are kept in a single tray, even though different kinds of actions may be required on each one. One request needs a phone

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*This approach can be dangerous, however, if you don't put those "Bills to Pay" or "Receipts to Process" in front of your face as consistently as you should. Just having them "organized" isn't sufficient to get them off your mind—you've also got to review them appropriately.

call, another needs data reviewed, and still another is waiting for someone to get back with some information—but they're all sorted together. This arrangement can cause a person's mind to go numb to the stack because of all the decisions that are still pending about the next-action level of doing.

My personal system is highly portable, with almost everything kept on lists, but I still maintain two categories of paper-based reminders. I travel with a "Read/Review" plastic file folder and another one labeled "Data Entry." In the latter I put anything for which the next action is simply to input data into my computer (business cards that need to get into my telephone/address list, quotes for my "Quotes" database, articles about restaurants I want to put on my "Travel—Cities" sublists, etc.).

Managing E-mail-Based Workflow

Like some paper-based materials, e-mails that need action are sometimes best as their own reminders—in this case within the tracked e-mail system itself. This is especially likely to be true if you get a lot of e-mail and spend a lot of your work time with your e-mail software booted up. E-mails that you need to act on may then be stored within the system instead of having their embedded actions written out on a list.

Many of my clients have found it helpful to set up two or three unique folders on their e-mail navigator bars. True, most folders in e-mail should be used for reference or archived materials, but it's also possible to set up a workable system that will keep your actionable messages discretely organized, outside of the "in" area itself (which is where most people keep them).

I recommend that you create one folder for any longer-than-two-minute e-mails that you need to act on (again, you should be able to dispatch many messages right off the bat by following the two-minute rule). The folder name should begin with a prefix letter or symbol so that (1) it looks different from your reference folders and (2) it sits at the top of your folders in the navigator bar. Use something like the "@" sign in Microsoft or the dash ("-") in

Lotus, which sort into their systems at the top. Your resulting "FACTION" folder will hold those e-mails that you need to do something about.

Next you can create a folder titled "@WAITING FOR," which will show up in the same place as the "@ACTION" folder. Then, as you receive e-mails that indicate that someone is going to do something that you care about tracking, you can drag them over into the "@WAITING FOR" file. It can also hold reminders for anything that you delegate via e-mail: when you forward something, or use e-mail to make a request or delegate an action, just save a copy into the "@WAITING FOR" file.*

Some applications (such as Lotus Notes) allow you to file a copy of an e-mail into one of your folders as you send it (with a "Send and File" button). Others (e.g., Outlook) will simultaneously save only into your universal "Sent Mail" folder. In the latter case, what seems to work best for many is to copy ("cc" or "bcc") themselves when they delegate via e-mail, and then to pull that copy into their "@WAITING FOR" folder. (It's relatively easy to program Outlook to automatically send any e-mail that you "cc" to yourself into a designated folder, which would replicate the process just described.)

Getting E-mail "In" to "Empty" The method detailed above will enable you to actually get everything out of your e-mail in-basket, which will be a huge boon to your clarity about and control of your day-to-day work. You'll reclaim "in" as "in," so anything residing there will be like a message on your answering machine—a blinking light telling you you need to process something! Most people use their e-mail "in" for staging still-undecided actionable things and reference, a practice that rapidly numbs the mind: they know they've got to reassess everything *every*

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*Microsoft Outlook allows users to copy or move e-mails into its "Tasks" context, which, if organized according to my recommended categories, could work equally well.

It requires much less energy to maintain e-mail at a zero base than at a thousand base.

time they glance at the screen. If you never had more than a screenful of e-mails, this approach might be reasonably functional, but with the volume most professionals are dealing with these days, that doesn't apply.

Again, getting "in" empty doesn't mean you've handled everything. It means that you've DELETED what you could, FILED what you wanted to keep but don't need to act on, DONE the less-than-two-minute responses, and moved into your reminder folders all the things you're waiting for and all your actionable e-mails. *Now* you can open the "@ACTION" file and review the e-mails that you've determined you need to spend time on. Isn't that process easier to relate to than fumbling through multiple screens, fearing all the while that you may miss something that'll blow up on you?

A Caution About Dispersing Reminders of Your Actions

"Out of sight, out of mind" is not really out of mind.

There's an obvious danger in putting reminders of things you need to do somewhere out of sight. The function of an organization system is primarily to supply the reminders you need to see *when* you need to see them, so you can trust your choices about what you're doing (and what you're not doing). Before you leave the office for the day, the actionable e-mails that you still have pending must be reviewed individually, just like your "Calls" or "At Computer" lists. In essence, "@ACTION" is an extension of your "At Computer" list and should be handled in exactly the same fashion. Your paper-based "Pending" workflow must likewise be assessed like a list if the paper materials are being used as your only reminders.

Distributing action triggers in a folder, on lists, and/or in an e-mail system is perfectly OK, *as long as you review all of the categories to which you've entrusted your triggers equally, as required.* You don't want things lurking in the recesses of your systems and not being used for their intended purpose: reminding you.

In order to hang out with friends or take a long, aimless walk and truly have nothing on your mind, you've got to know where all your actionable items are located, what they are, and that they will wait. And you need to be able to do that in a few seconds, not days.

Organizing Project Reminders

Creating and maintaining one list of all your projects (that is, again, every commitment or desired outcome that may require more than one action step to complete) can be a profound experience! You probably have more of them than you think. If you haven't done so already, I recommend that initially you make a "Projects" list in a very simple format, similar to the ones you've used for your lists of actions: it can be a category in a digital organizer, a page in a loose-leaf planner, or even a single file folder labeled "PROJECTS," with either a master list or separate sheets of paper for each one.

The "Projects" List(s)

The "Projects" list is not meant to hold plans or details about your projects themselves, nor should you try to keep it arranged by priority or size or urgency—it's just a comprehensive index of your open loops. You actually won't be working off of the "Projects" list during your day-to-day activities; for the most part, your action lists and any ad hoc tasks that come up will constitute your tactical in-the-moment focus. Remember, you can't *do* a project, you can only do the action steps it requires.

The real value of the "Projects" list lies in the complete review it can provide (at least once a week), allowing you to ensure that you have action steps defined for all of your projects, and that nothing is slipping through the cracks. A quick glance at this list from time to time will enhance your underlying

A complete and current "Projects" list is the major operational tool for moving from tree-hugging to forest management.

sense of control. You'll also know that you have an inventory available to you (and to others) whenever it seems advisable to evaluate workload(s).

One List, or Subdivided?

Most people find that one list is the best way to go because it serves as a master inventory rather than as a daily prioritizing guideline. The organizing system merely provides placeholders for all your open loops and options so your mind can more easily make the necessary intuitive, moment-to-moment strategic decisions.

Frankly, it doesn't matter how many different lists of projects you have, so long as you look at the contents of *all* of them as often as you need to, since for the most part you'll do that in one fell swoop during your Weekly Review.

Some Common Ways to Subsort Projects

There are some situations in which it makes good sense to subsort a "Projects" list. Let's look at these one by one.

Personal/Professional Many people feel more comfortable seeing their lists divided up between personal and professional * projects. If you're among them, be advised that your "Personal" list will need to be reviewed as judiciously as your "Professional" one, and not just saved for weekends. Many actions on personal things will need to be handled on weekdays, exactly like everything else. And often some of the greatest pressures on professionals stem from the personal aspects of their lives that they are letting slip.

Delegated Projects If you're a senior manager or executive, you probably have several projects that you are directly responsible for but have handed off to people who report to you. While you could, of course, put them on your "Waiting For" list, it might make better sense to create a "Projects—Delegated" list to track them: your task will be simply to review the list regularly enough to ensure that everything on it is moving along appropriately.

Specific Types of Projects Some professionals have as part of their work several different projects of the same *type*, which in some instances it maybe valuable to group together as a sublist of "Projects." For example, I maintain a separate category called "Projects to Deliver," a chronological listing of all the upcoming seminars, coaching, and consulting assignments I've committed to. These events are "projects" like the rest, in that I need to keep noting whether things are moving along on and in place for them until they're completed. But I find it helpful to see them all organized on one list, in the order in which they are coming up on my calendar, apart from my other projects.

If you are a real estate agent, sell consulting services, or develop proposals for a relatively small number of prospective clients in any profession, you will likely find it useful to see all of your outstanding "sales relationships in progress" in one view. This could be a separate list in your planner called "Client Projects in Development," or if you already have file folders for each in-progress project, it may suffice to group them all in one file stand on your credenza. Just realize that this approach will work only if it represents a complete set of all of those situations that require action, and only if you review them regularly along with the rest of your projects, keeping them current and conscious.

What About Subprojects?

Some of your projects will likely have major *sub*projects, each of which could in theory be seen as a whole project. If you're moving into a new house, for instance, and are upgrading and changing much of the property, you may have a list of actionable items like "Finalize landscaping," "Renovate kitchen," "Rewire basement," and so on, all of which could in themselves be considered separate projects. Do you make all of this one entry on your "Projects" list—say, "Finish new home renovations"—or do you write up each of the subprojects as an individual line item?

Actually, it won't matter, as long as you review all the components of the project as frequently as you need to to stay productive. No external tool or organizing format is going to be perfect for sorting both horizontally across and vertically down through all your projects; you'll still have to be aware of the whole in some cohesive way (such as via your Weekly Review). If you make the large project your one listing on your "Projects" list, you'll want to keep a list of the subprojects and/or the project plan itself as "project support material" to be reviewed when you come to that major item. I would recommend doing it this way if big pieces of the project are *dependent* on other pieces getting done first. In that scenario you might have subprojects with no next actions attached to them because they are in a sense "waiting for" other things to happen before they can move forward. For instance, you might not be able to start on "Renovate kitchen" until you finish "Rewire basement." However, you might be able to proceed on "Finalize landscaping" independent of either of the other subprojects. You would therefore want a next action to be continually current on "Rewire basement" *and* "Finalize landscaping."

Don't be too concerned about which way is best. If you're not * sure, I'd vote for putting your Big Projects on the "Projects" list and holding the subpieces in your project support material, making sure to include them in your Weekly Review, If that arrangement doesn't feel quite right, try including the *active* and independent subprojects as separate entries on your master list.

How you list projects and subprojects is up to you; just be sure you know where to find all the moving parts.

There's no perfect system for tracking all your projects and subprojects the same way. You just need to know you *have* projects and, if they have associated components, where to find the appropriate reminders for them.

Project Support Materials

Project support materials are not project actions, and they're not project reminders. They're resources to support your actions and thinking about your projects.

Don't Use Support Material for Reminding Typically, people use stacks of papers and thickly stuffed file folders *as reminders* that (1) they've *got* a project, and (2) they've got to do something about it. They're essentially making support materials serve as action reminders. The problem is that next actions and "Waiting For" items on these projects have usually not been determined and are psychologically still embedded in the stacks and the folders—giving them the aura of just more "stuff" that repels its (un)organizer instead of attracting him or her to action. When you're on the run, in the heat of the activities of the day, files like that are the last thing you'll want to pick up and peruse for actions. You'll actually go numb to the files and the piles because they don't prompt you to do anything and they simply create more anxiety.

If you're in this kind of situation, you must first add the project itself to your "Projects" list, as a reminder that there's an outcome to be achieved. Then the action steps and "Waiting For" items must be put onto their appropriate action reminder lists. Finally, when it's time to actually *do* an action, like making a call to someone about the project, you can pull out all the materials you think you might need to have as support during the conversation.

To reiterate, you *don't* want to use support materials as your primary reminders of what to do—that should be relegated to your action lists. If, however, the materials contain project plans and overviews in addition to ad hoc archival and reference information, you may want to keep them a little more visibly accessible than you do the pure reference materials in your filing cabinet. The latter place is fine for support stuff, too, so long as you have the discipline to pull out the file drawer and take a look at the plan every time you do your Weekly Review. If not, you're better off storing those kinds of project support files in a standing file holder or a separate "Pending" stack-basket on your desk or credenza.

To return to the previous example of moving into a new house, you could have a folder labeled "New House" containing all the plans and details and notes about the landscaping and the kitchen and the basement. In your Weekly Review, when you came to "Finish new home renovations" on your "Projects" list, you'd pull out the "New House" file and thumb through all your notes to ensure that you weren't missing any possible next actions. Those actions would then get done, delegated, or deferred onto your action lists, and the folder would be refiled until you needed it again for doing the actions or for your next Weekly Review.

Many people who interact with prospects and clients have attempted to use client folders and/or contact-management software such as Act! to "manage the account." The problem here is that some material is just facts or historical data that needs to be stored as background for when you might be able to use it, and some of what must be tracked is the actions required to move the relationships forward. The latter can be more effectively organized within your action-lists system. Client information is just that, and it can be folded into a general-reference file on the client or stored within a client-focused library. (I use Act! for the single great feature it offers of allowing me to cross-reference general company information and significant interactions with key people within the company. It's just a good client-centered database.) If I need to call a client, I don't want that reminder embedded anywhere but on my "Calls" list.

Organizing Ad Hoc Project Thinking

In chapter 3, I suggested that you will often have ideas that you'll want to keep about projects but that are not necessarily next actions. Those ideas fall into the broad category of "project support materials," and may be anything from a notion about something you might want to do on your next vacation to a clarification of some major components in a project plan. These thoughts could come as you're driving down the freeway listening to a news story on the radio, or reading a relevant article. What do you do with that kind of material?

There is no need" ever to lose an idea about a project, theme, or topic.

My recommendation here is that you consider where you're keeping tabs on the project or topic itself, how you might add information to it in that format, and where you might store any more extensive data associated with it. Most professionals will have several options for how to handle support materials, including attaching notes to a list item, organizing digital information in e-mail and/or databases, and maintaining paper-based files and notes in notebooks.

Attached Notes Most organizing software allows you to attach a digital "note" to a list or calendar entry. If you're keeping a "Projects" list within the software, you can go to the project you had a thought about, open or attach a "note" to it, and type in your idea. This is an excellent way to capture "back-of-the-envelope" project thinking. If your "Projects" list is paper-based, you can attach a Post-it note next to the item on your master list or, if you're a low-tech type, on the item's separate sheet. In any case, you'll need to remember to look at the attachment when you review your project, to make use of the data.

E-mail and Databases E-mails that might contain good information related to your projects can be held in a dedicated e-mail folder (just follow the instructions on pages 152-53 for "@ACTION" and call it something like "@PROJECTS"). You may also find it worthwhile, if you don't have one already, to set up a more rigorous kind of digital database for organizing your thinking on a project or topic. If your company uses Lotus Notes, for example, you can create a project database either for your own private use on your PC or to be shared with others in your network.* It's worth looking into some of the other types of free-form databases that are on the market, too—even just for your own use. It's great to be able to cut and paste from the Web or from e-mails and drop data under a topic somewhere or type in your own thoughts. Be sure, also, to explore the technology and tools that you already have—just learning how to use all the lists and attachments in something like the Palm organizer may provide you with sufficient "back-of-the-envelope" capability.

Paper-Based Files Having a separate file folder devoted to each project makes a lot of sense when you're accumulating paper-based materials; it may be low-tech, but it's an elegant solution nonetheless. Simplicity and ease of handling make for a good general-reference filing system—one that lets you feel comfortable about creating a folder for scraps of paper from a meeting.

Pages in Notebooks A great advantage of paper-based loose-leaf notebooks is that you can dedicate a whole page or group of pages to an individual project. For years I maintained a midsize notebook with a "Projects" list in front and a "Project Support" section toward the back, where I always had some blank pages to capture any random thinking or plans and details about projects on my list.

Each of the methods described above can be effective in organizing project thinking. The key is that you must consistently look for any action steps inherent in your project notes, and review the notes themselves as often as you think is necessary, given the nature of the project.

You'll also want to clear out many of your notes once they

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*Many Lotus Notes users don't even realize they can do this, but in fact it's one of the program's most powerful features. If you have Notes, check with your resident IT resource person and have him or her request system permission and show you how.

become inactive or unreal, to keep the whole system from catching the "stale" virus. I've found a lot of value in capturing these types of thoughts, more for the way it consistently helps my thinking process than because I end up using every idea (most I don't!). But I try to make sure not to let my old thoughts stay around too long, pretending they're useful when they're not.

Organizing Nonactionable Data

Interestingly, one of the biggest problems with most people's personal management systems is that they blend a few actionable things with a large amount of data and material that has value but no action attached. Having good, consistent structures with which to manage the nonactionable items in our work and lives is as important as managing our action and project reminders. When the nonactionable items aren't properly managed, they clog up the whole process.

Unactionable items fall into two large categories: reference materials and reminders of things that need no action now but might at a later date.

Reference Materials

Much of what comes across your desk and into your life in general is reference material. There's no action required, but it's information that you want to keep, for a variety of reasons. Your major decisions will be how much to keep, how much room to dedicate to it, what form it should be stored in, and where. Much of that will be a personal or organizational judgment call based upon legal or logistical concerns or personal preferences. The only time you should have attention on your reference material is when you need to change your system in some way because you have too much or too little information, given your needs or preferences.

The problem most people have psychologically with all their stuff is that it's still "stuff"—that is, they haven't decided what's actionable and what's not. Once you've made a clean distinction about which is which, what's left as reference should have no pull or incompletion associated with it—it's just your library. Your only decision then is how big a library you want. When you've fully implemented this action-management methodology, you can be as big a packrat as your space (physical and digital) will allow. As I've increased the size of the hard disk in my computer, I've kept that much more e-mail in my archives. The more the merrier, as far as I'm concerned, since increasing the volume of pure reference material adds no psychic weight.

The Variety of Reference Systems

There are a number of ways to organize reference material, and many types of tools to use. What follows is a brief discussion of some of the most common.

- General-reference filing—paper and e-mail
- Large-category filing
- Rolodexes and contact managers
- Libraries and archives

Your filing system should be a simple library of data, easily retrievable—not your reminder for actions, projects, priorities,

General-Reference Filing As I've said, a good filing system is critical for processing and organizing your stuff. It's also a must for dealing with the sometimes huge volume of paper-based materials that are valuable for you for one reason or another. Ideally you will already have set up a general-reference filing system as you were processing "in." You need to feel comfortable storing even a single piece of paper that you might want to refer to later, and your system must be informal and accessible enough that it's a snap to file it away in your alphabetized general-reference system, right at hand where you work. If you're not set up that way yet, look back at chapter 4 for help on this topic.

Most people seem to wind up with 200 to 400 paper-based general-reference files and 30 to 100 e-mail reference folders.

Large-Category Filing Any topic that requires more than fifty file folders should probably be given its own section or drawer, with its own alpha-sorted system. For instance, if you're managing a corporate merger and need to keep hold of a lot of the paperwork, you may want to dedicate two or three whole file cabinets to all the documentation required in the due-diligence process. If gardening or sailing or cooking is your passion, you may need at least a whole file drawer for those designated hobbies.

Bear in mind that if your "area of focus" has support material that could blend into other "areas of focus," you may run into the dilemma of whether to store the information in general reference or in the specialized reference files. When you read a great article about wood fencing and want to keep it, does that go in your "Garden" cabinet or in the general system with other information about home-related projects? As a general rule, it's best to stick with one general-reference system except for a very limited number of discrete topics.

Rolodexes and Contact Managers Much of the information that you need to keep is directly related to people in your network. You need to track contact information of all sorts—home and office phone numbers and addresses, cell-phone numbers, fax numbers, e-mail addresses, and so on. In addition, if you find it useful, you may want to maintain information about birthdays, names of friends' and colleagues' family members, hobbies, favorite wines and foods, and the like. In a more rigorous professional vein, you may need or want to track hire dates, performance-review dates, goals and objectives, and other potentially relevant data for staff development purposes.

The telephone/address section of most of the organizers sold in the last fifty years is probably (along with the calendar) their most commonly used component. Everyone needs to keep track of phone numbers. It's instructive to note that this is purely and simply reference material. No action is required—this is just information that you might need to access in the future.

So there's no big mystery about how to organize it, aside from the logistics for your individual needs. Again, the only problem comes up when people try to make their Rolodexes serve as tools for reminding them about things they need to *do*. That doesn't work. As long as all the actions relative to people you know have been identified and tracked in your action reminder lists, there's no role for telephone and address systems to fill other than being a neutral address book.

The only issue then becomes how much information you need to keep and where and in what equipment you need to keep it in order to have it accessible when you want it. Nothing's perfect in that regard, but as the small digital tools become easier to use and connect to larger databases, you'll be able to have more information at hand with the same or less effort.

Libraries and Archives: Personalized Levels Information that might be useful lives at many levels. You could probably find out pretty much *anything* if you were willing to dig deep enough. The question of how much to keep, how close, and in what form, will be a changing reality, given the variables of your needs and your particular comfort levels with data. Relative to your personal organization and productivity, this is not a core issue, so long as all of your projects and actions are in a control system that you work with regularly. Reference material in all its forms then becomes nothing more or less than material to capture and create access to according to your particular proclivities and requirements.

If material is purely for reference, the only issue is whether it's worth the time and space required to keep it.

Some degree of consistency will always make things easier. What kinds of things do you need with you all the time? Those must go into your ubiquitous planner or PDA. What do you need specifically for meetings or off-site events? That should be put into your briefcase, pack, satchel, or purse. What might you need when you're working in your office? That should be put into your personal filing system or your networked computer. What about rare situations relative to your job? Material needed for those could be archived in departmental files or off-site storage. What could you find anytime you might need it, on the Web? You don't need to do anything with that information, unless you need it when you're away from a Web connection, in which case you should print the data out when you're online and store it in a file you can take with you.

Do you see how that personal organization of reference material is simply a logistical issue? Distinguishing actionable things from nonactionable ones is the key success factor in this arena. Once you've done that, you have total freedom to manage and organize as much or as little reference material as you want. It's a highly individual decision that ought to be based on the ratio of the value received to the time and effort required to capture and maintain it.

Someday/Maybes

The last thing to deal with in your organization system is how to track things that you may want to reassess in the future. These could range from a special trip you might want to take one day, to books you might want to read, to projects you might want to tackle in the next fiscal year, to skills and talents you might want to develop. For a full implementation of this model you'll need some sort of "back burner" or "on hold" component.

Someday/Maybe's are not throwaway items. They may be some of the most interesting and creative things you'll ever get involved with.

There are several ways to stage things for later review, all of which will work to get them off your current radar and your mind. You can put the items on various versions of "Someday/Maybe" lists or trigger them on your calendar or in a paper-based "tickler" system.

"Someday/Maybe" List

It's highly likely that if you did a complete mind-sweep when you were collecting things out of your psychic RAM, you came up with some things you're not *sure* you want to commit to. "Learn Spanish," "Get Marcie a horse," "Climb Mt, Washington," and "Build a guest cottage" are typical projects that fall into this category.

If you haven't already done it, I recommend that you create a "Someday/Maybe" list in whatever organizing system you've chosen. Then give yourself permission to populate that list with all the items of that type that have occurred to you so far. You'll probably discover that simply having the list and starting to fill it out will cause you to come up with all kinds of creative ideas.

You may also be surprised to find that some of the things you write on the list will actually come to pass, almost without your making any conscious effort to make them happen. If you acknowledge the power of the imagination to foster changes in perception and performance, it's easy to see how having a "Someday/Maybe" list out in front of your conscious mind could potentially add many wonderful adventures to your life and work. We're likely to seize opportunities when they arise if we've already identified and captured them as a possibility. That has certainly been my own experience: learning to play the flute and how to sail big boats both started in this category for me. In addition to your in-basket, there are two rich sources to tap for your "Someday/Maybe" list: your creative imagination and your list of current projects.

Make an Inventory of Your Creative Imaginings What are the things you really might want to do someday if you have the time, money, and inclination? Write them on your have "Someday/ Maybe" list. Typical categories include:

- Things to get or build for your home
- Hobbies to take up

- Skills to learn
- Creative expressions to explore
- Clothes and accessories to buy
- Toys (gear!) to acquire
- Trips to take
- Organizations to join
- Service projects to contribute to
- Things to see and do

Reassess Your Current Projects Now's a good time to review your "Projects" list from a more elevated perspective (that is, the standpoint of your job and goals) and consider whether you might transfer some of your current commitments to "Someday/Maybe." If on reflection you realize that an optional project doesn't have a chance of getting your attention for the next months or more, move it to this list.

What lies in our power to do, lies in our power not to do.

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Special Categories of "Someday/Maybe"

More than likely you have some special interests that involve lots of possible things to do. It can be fun to collect these on lists. For instance:

- Food—recipes, menus, restaurants, wines
- Children—things to do with them
- Books to read
- CDs to buy
- Videos to buy/rent
- Cultural events to attend
- Gift ideas
- Garden ideas
- Web sites to surf
- Weekend trips to take
- Meeting ideas
- Party ideas

• Ideas—Misc. (meaning you don't know where else to put them!)

These kinds of lists can be a cross between reference and "Someday/Maybe"—reference because you can just collect and add to lists of good wines or restaurants or books, to consult as you like; "Someday/Maybe" because you might want to review the listed items on a regular basis to remind yourself to try one or more of them at some point.

In any case, this is another great reason to have an organizing system that makes it easy to capture things that may add value and variety and interest to your life—without clogging your mind and work space with undecided, unfinished business.

The Danger of "Hold and Review" Files and Piles

Many people have created some sort of "Hold and Review" pile or file (or whole drawer) that vaguely fits within the category of "Someday/Maybe." They tell themselves, "When I have time, I may like to get to this," and a "Hold and Review" file seems a convenient place to put it. I personally don't recommend this particular kind of subsystem, because in virtually every case I have come across, the client "held" but didn't "review," and there was numbness and resistance about the stack. The value of "someday/maybe" disappears if you don't put your conscious awareness back on it with some consistency.

Also, there's a big difference between something that's managed well, as a "Someday/Maybe" list, and something that's just a catchall bucket for "stuff." Usually much of that stuff needs to be tossed, some of it needs to go into "Read/Review," some needs to be filed as reference, some belongs on the calendar or in a tickler file (see page 173) for review in a month or perhaps at the beginning of the next quarter, and some actually has next actions on it. Many times, after appropriately processing someone's "Hold and Review" drawer or file, I've discovered there was nothing left in it!

Using the Calendar for Future Options

Your calendar can be a very handy place to park reminders of things you *might* want to consider doing in the future. Most of the people I've coached were not nearly as comfortable with their calendars as they could have been; otherwise they probably would have found many more things to put in there.

One of the three uses of a calendar is for *day-specific information.* This category can include a number of things, but one of the most creative ways to utilize this function is to enter things that you want to take off your mind and reassess at some later date. Here are a few of the myriad things you should consider inserting:

- Triggers for activating projects
- Events you might want to participate in
- Decision catalysts

Triggers for Activating Projects If you have a project that you don't really need to think about now but that deserves a flag at some point in the future, you can pick an appropriate date and put a reminder about the project in your calendar for that day. It should go in some day-specific (versus time-specific) calendar slot for the things you want to be reminded of on that day; then when the day arrives, you see the reminder and insert the item as an active project on your "Projects" list. Typical candidates for this treatment are:

- Special events with a certain lead time for handling (product launches, fund-raising drives, etc.)
- Regular events that you need to prepare for, such as budget reviews, annual conferences, planning events, or meetings (e.g., when should you add next year's "annual sales conference" to your "Projects" list?)
- Key dates for significant people that you might want to do something about (birthdays, anniversaries, holiday gift-giving, etc.)

Events You Might Want to Participate In You probably get notices constantly about seminars, conferences, speeches, and social and cultural events that you may want to decide about attending as the time gets closer. So figure out when that "closer" time is and put a trigger in your calendar on the appropriate date—for example:

"Chamber of Commerce breakfast tomorrow?"
"Tigers season tickets go on sale today"
"PBS special on Australia tonight 8:00 P.M."
"Church BBQ next Saturday"

If you can think of any jogs like these that you'd like to put into your system, do it right now.

Decision Catalysts Once in a while there may be a significant decision that you need to make but can't (or don't want to) make right away. That's fine, as long as you've concluded that the additional information you need has to come from an *internal* rather than an *external* source (e.g., you need to sleep on it). (Obviously, external data you need in order to make a decision should go on your "Next Actions" or "Waiting For" lists.) But in order to move to a level of OK-ness about *not* deciding, you'd better put out a safety net that you can trust to get you to focus on the issue appropriately in the future. A calendar reminder can serve that purpose.*

It's OK to decide not to decide—as long as you have a decide-not-to-decide system.

Some typical decision areas in this category include:

- Hire/fire
- Merge/acquire/sell/divest
- Change job/career

*If you're using a group-accessible calendar, you must maintain discretion about these kinds of triggers. Digital calendars usually have "private" categorization functions you can use for entries you don't necessarily want everyone to see.

This is a big topic to devote so little space to, I know, but go ahead and ask yourself, "Is there any major decision for which I should create a future trigger, so I can feel comfortable just 'hanging out' with it for now?" If there is, put some reminder in your calendar to revisit the issue.

The "Tickler" File

One elegant way to manage nonactionable items that may need an action in the future is the "tickler" file.* A three-dimensional version of a calendar, it allows you to hold *physical* reminders of things that you want to see or remember—not now, but in the future. It can be an extremely functional tool, allowing you to in effect set up your own post office and "mail" things to yourself for receipt on a designated future date. I myself have used a tickler file for years and can't imagine being without it.

Essentially the tickler is a simple file-folder system that allows you to distribute paper and other physical reminders in such a way that whatever you want to see on a particular date in the future "automatically" shows up that day in your in-basket.

If you have a secretary or assistant, you can entrust at least a part of this task to him or her, assuming that he/she has some working version of this or a similar system. Typical examples would be:

- "Hand me this agenda the morning of the day I have the meeting."
- "Give this back to me on Monday to rethink, since it applies to a meeting on Wednesday."
- "Remind me about the Hong Kong trip two weeks ahead, and we'll plan the logistics."

Then every day of the week, that day's folder is pulled and reviewed.

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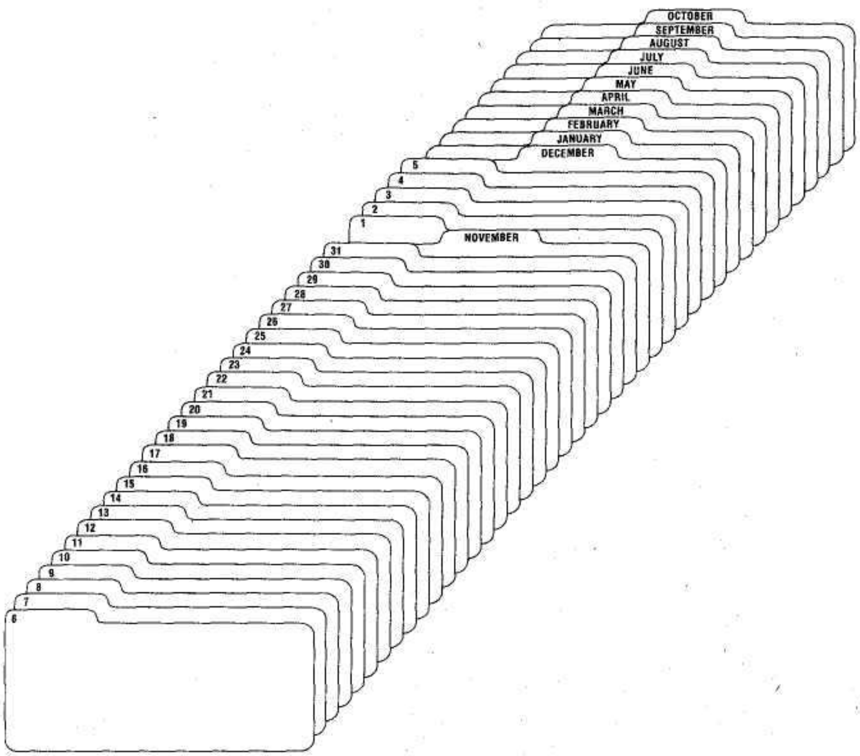
*Also referred to as a "suspense," "bring forward," or "follow-up" file.

While you can (and probably should) utilize staff to handle as much of this as is appropriate, I recommend that, if you can integrate it into your life-style, you maintain your own tickler file. There are many useful functions it can perform, at least some of which you may want to avail yourself of outside the pale of your assistant's responsibilities. I use my tickler file to manage my travel tickets and confirmations; paper-based travel directions, agendas, and maps; reminders of event notifications that come in the mail; information about "might-want-to-buy" kinds of things I want to reconsider in the future; and so forth.

Bottom line: the tickler file demands only a one-second-per-day new behavior to make it work, and it has a payoff value logarithmically greater than the personal investment.

Setting Up a Tickler File You need forty-three folders—thirty-one daily files labeled "1" through "31," and twelve more labeled with the names of the months of the year. The daily files are kept in front, beginning with the file for tomorrow's date (if today is October 5, then the first file would be "6"). The succeeding daily files represent the days of the rest of the month ("6" through "31"). Behind the "31" file is the monthly file for the next month ("November"), and behind that are the daily files "1" though "5." Following that are the rest of the monthly files ("December" through "October"). The next daily file is emptied into your in-basket every day, and then the folder is refiled at the back of the dailies (at which point, instead of October 6, it represents *November* 6). In the same way, when the next monthly file reaches the front (on October 31 after you empty the daily file, the "November" file will be the next one, with the daily files "1" through "31" behind it), it's emptied into the in-basket and refiled at the back of the monthlies to represent November a year from now. This is a "perpetual" file, meaning that at any given time it contains files for the next thirty-one days and the next twelve months.

The big advantage of using file folders for your tickler system is that they allow you to store actual documents (the form that needs



FILE-FOLDER-STYLE SAMPLE SETUP (OCTOBER 5)

to be filled out on a certain day, the memo that needs to be reviewed then, the telephone note that needs action on a specific date, etc.).

In order for the system to work, you must update it every day. If you forget to empty the daily file, you won't trust the system to handle important data, and you'll have to manage those things some other way. If you leave town (or don't access the file on the weekend), you must be sure to check the folders for the days you'll be away, *before* you go.

Checklists: Creative Reminders

The last topic in personal system organization that deserves some attention is the care and feeding of checklists, those *recipes of potential ingredients* for projects, events, and areas of value, interest, and responsibility.

The most creative checklists are often generated at the back end of a good consulting process with a team or company. Good ones also show up as areas of focus for training staff or hiring into job slots.

When I'm clearing in-baskets with clients and reviewing other things they're concerned about, we often run across little "Memos to Self" like:

- Exercise more regularly.
- Make sure we have evaluation forms for each training.
- Spend more quality time with my kids.
- Do more proactive planning for the division.
- Maintain good morale with my team.
- Ensure we are in alignment with corporate strategy.
- Keep the client billing process up to date.

What should you do with these "fuzzier" kinds of internal commitments and areas of attention?

First, Clarify Inherent Projects and Actions

For much of this kind of "stuff," there is still a project and/or an action that needs to be defined. "Exercise more regularly" *really* translates for many people into "Set up regular exercise program" (project) and "Call Sally for suggestions about personal trainers" (real action step). In such cases, *inherent* projects and actions still need to be clarified and organized into a personal system.

But there *are* some things that don't quite fit into that category.

Blueprinting Key Areas of Work and Responsibility

Objectives like "Maintain good physical conditioning" or "Physical health and vitality" may still need to be built into some sort of overview checklist that will be reviewed regularly. You have multiple layers of outcomes and standards playing on your psyche and your choices at any point in time, and knowing what those are, at all the different levels, is always a good idea.

I suggested earlier that there are at least six levels of your "work" that could be defined, and that each level deserves its own acknowledgment and evaluation. A complete inventory of everything you hold important and are committed to on each of those levels would represent an awesome checklist. It might include:

- Career goals
- Service
- Family
- Relationships
- Community
- Health and energy
- Financial resources
- Creative expression

And then moving down a level, within your job, you might want some reminders of your key areas of responsibility, your staff, your values, and so on. A list of these might contain points like:

- Team morale
- Processes
- Timelines
- Staff issues
- Workload
- Communication

All of these items could in turn be included on the lists in your personal system, as reminders to you, as needed, to keep the ship on course, on an even keel.

The More Novel the Situation, the More Control Is Required

The degree to which any of us needs to maintain checklists and external controls is directly related to our unfamiliarity with the area of responsibility. If you've been doing what you're doing for a long time, and there's no pressure on you to change in that area, you probably need minimal external personal organization to stay on cruise control. You know when things must happen, and how to make them happen, and your system is fine, status quo. Often, though, that's not the case.

Many times you'll want some sort of checklist to help you maintain a focus until you're more familiar with what you're doing. If your CEO suddenly disappeared, for example, and you had instantly to fill his shoes, you'd need some overviews and outlines in front of you for a while to ensure that you had all the mission-critical aspects of the job handled. And if you've just been hired into a new position, with new responsibilities that are relatively unfamiliar to you, you'll want a framework of control and , structure, if only for the first few months.

There have been times when I needed to make a list of areas that I had to handle, temporarily, until things were under control. For instance, when my wife and I decided to create a brand-new structure for a business we'd been involved with for many years, I took on areas of responsibility I'd never had to deal with before—namely, accounting, computers, marketing, legal, and administration. For several months I needed to keep a checklist of those responsibilities in front of me to ensure that I filled in the blanks everywhere and managed the transition as well as I could. After the business got onto "cruise control" to some degree, I no longer needed that list.

Checklists can be highly useful to let you know what you *don't* need to be concerned about.

Checklists at All Levels

Be open to creating any kind of checklist as the urge strikes you. The possibilities are endless—from "Core Life Values" to "Things to Take Camping." Making lists, ad hoc, as they occur to you, is one of the most powerful yet subtlest and simplest procedures that you can install in your life.

To spark your creative thinking, here's a list of some of the topics of checklists I've seen and used over the years:

- Personal Affirmations (i.e., personal value statements)
- Job Areas of Responsibility (key responsibility areas)
- Travel Checklist (everything to take on or do before a trip)
- Weekly Review (everything to review and/or update on a weekly basis)
- Training Program Components (all the things to handle when putting on an event, front to back)
- Clients
- Conference Checklist (everything to handle when putting on a conference)
- Focus Areas (key life roles and responsibilities)
- Key People in My Life/Work (relationships to assess regularly for completion and opportunity development)
- Organization Chart (key people and areas of output to manage and maintain)
- Personal Development (things to evaluate regularly to ensure personal balance and progress)

Get comfortable with checklists, both ad hoc and more permanent. Be ready to create and eliminate them as required. Appropriately used, they can be a tremendous asset in personal productivity.

If in fact you have now *collected* everything that represents an open loop in your life and *work, processed* each one of those items in terms of what it means to you and what actions are required, and *organized* the results into a complete system that holds a current and complete overview—large and small—of all your present and "someday" projects, then you're ready for the next phase of implementation in the art of stress-free productivity—the review process.