

Getting Started: Setting Up the Time, Space, and Tools

IN PART 2 we'll move from a conceptual framework and limited application of workflow mastery to full-scale implementation and best practices. Going through this program often gives people a level of relaxed control they may never have experienced before, but it usually requires the catalyst of step-by-step procedures to get there. To that end, I'll provide a logical sequence of things to do, to make it as easy as possible for you to get on board and glean the most value from these techniques.

Implementation—Whether All-Out or Casual—Is a Lot About "Tricks"

If you're not sure you're committed to an all-out implementation of these methods, let me assure you that a lot of the value people get from this material is good "tricks." Sometimes just one good trick can make it worthwhile to range through this information: I've had people tell me, for example, that the best thing they got from my two-day seminar was advice on setting up and using a tickler file. Tricks are for the not-so-smart, not-so-conscious part of us. To a great degree, the highest-performing people I know are those who have installed the best tricks in their lives. I know that's

*It is easier to act
yourself into a
better way of
feeling than to feel
yourself into a
better way of
action.*
—O. H. Mowrer

true of me. The smart part of us sets up things for us to do that the not-so-smart part responds to almost automatically, creating behavior that produces high-performance results. We trick ourselves into doing what we ought to be doing.

For instance, if you're a semiregular exerciser like me, you probably have your own little tricks to get you to exercise. My best trick is *costume*—the clothing I put on or take off. If I put on exercise gear, I'll start to feel like exercising; if I don't, I'm very likely to feel like doing something else.

Let's look at an example of a real productivity trick. You've probably taken work home that you *had* to bring back the next day, right? It was mission-critical that you not forget it the next morning. So where did you put it the night before? Did you put it in front of the door, or on your keys, so you'd be sure to take it with you? For this you got a higher education? What a sophisticated piece of self-management technology you've installed in your life! But actually that's just what it is. The smart part of you the night before knows that the not-so-smart part of you first thing in the morning may barely be conscious. "What's this in front of the door!?" Oh, that's right, I've got to take this with me!" What a class act. But really, it is. It's a trick I call Put It in Front of the Door. For our purposes the "door" is going to be the door of your mind, not your house. But it's the same idea.

If you were to take out your calendar right now and look closely at every single item for the next fourteen days, you'd probably come up with *at least* one "Oh-that-reminds-me-I-need-to_____." If you then captured that value-added thought into some place that would trigger you to act, you'd feel better already, have a clearer head, and get more positive things done. It's not rocket science, just a good trick.

You increase your productivity and creativity exponentially when you think about the right things at the right time and have the tools to capture your value-added thinking.

If you take out a clean sheet of paper right now, along with your favorite writing instrument, and for three minutes focus solely on the most awesome project on your mind, I guarantee you'll have at least one

"Oh, yeah, I need to consider ____." Then capture what shows up in your head on the piece of paper and put it where you might actually use the idea or information. You won't be one ounce smarter than you were ten minutes ago, but you'll have added value to your work and life.

Much of learning how to manage workflow in a "black belt" way is about laying out the gear and practicing the moves so that the requisite thinking happens more automatically and it's a lot easier to get engaged in the game. The suggestions that follow about getting time, space, and tools in place are all trusted methods for making things happen at a terrific new level.

If you're sincere about making a major leap forward in your personal management systems, I recommend that you pay close attention to the details and follow through on the suggestions provided below in their entirety. The whole will be greater than the sum of the parts. You'll also discover that the execution of this program will produce real progress on real things that are going on in your life right now. We'll get lots done that you want to get done, in new and efficient ways that may amaze you.

Setting Aside the Time

I recommend that you create a block of time to initialize this process and prepare a workstation with the appropriate space, furniture, and tools. If your space is properly set up and streamlined, it can reduce your unconscious resistance to dealing with your stuff and even make it *attractive* for you to sit down and crank through your input and your work. An ideal time frame for most people is two whole days, back to back. (Don't be put off by that if you don't have that long to spend, though: doing any of the activities I suggest will be useful, no matter how much or how little time you devote to them. Two days are not required to benefit from these techniques and principles—they will start to pay off almost instantly.) Implementing the full collection process can

take up to six hours or more, and processing and deciding on actions for all the input you'll want to externalize and capture into your system can easily take another eight hours. Of course you can also collect and process your stuff in chunks, but it'll be much easier if you can tackle that front-end portion in one fell swoop.

The ideal time for me to work with a professional is on a weekend or holiday because the chance of outside disturbance is minimal then. If I work with someone on a typical workday, we first make sure that no meetings are scheduled and only emergency interruptions are allowed; phone calls are routed to voice-mail, or logged by secretaries for review and handling during a break. I don't recommend using "after hours" for this work. It usually means seriously reduced horsepower and a big tendency to get caught up in "rabbit trails." *

For many of the executives I work with, holding the world back for two contiguous days is the hardest part of the whole process—the perceived necessity to be constantly available for meetings and communications when they're "at work" is difficult for them to let go of. That's why we often resort to weekends. If you work in an open cubicle or office, it will be even more of a challenge to isolate sufficient time blocks on a regular workday during office hours.

Dedicate two days to this process, and it will be worth many times that in terms of your productivity and mental health.

It's not that the procedure itself is so "sacred"; it's just that it takes a lot of psychic energy to collect and process such a large inventory of open loops, especially when they've been "open," "undecided," or "stuck" for way too long. Interruptions can double the time it takes to get through everything. If you can get to ground zero in one contained time period, it gives you a huge sense of control and accomplishment and frees up a reservoir of energy and creativity. Later on you can

*After hours is actually a good time to crank through a group of similar tasks that you wouldn't normally do in the course of your typical workday, like filing

a big backlog of papers, organizing photographs, surfing the Web about your upcoming vacation location, or processing expense receipts.

maintain your system in shorter spurts around and "between the lines" of your regular day.

Setting Up the Space

You'll need a physical location to serve as a central cockpit of control. If you already have a desk and office space set up where you work, that's probably the best place to start. If you work from a home office, obviously *that* will be your prime location. If you already have both, you'll want to establish identical, even interchangeable systems in both places.

The basics for a work space are just a writing surface and room for an in-basket. Some people, such as a foreman in a machine shop, an intake nurse on a hospital floor, or your children's nanny, won't need much more than that. The writing surface will of course expand for most professionals, to include a phone, a computer, stacking trays, working file drawers, reference shelves. Some may feel the need for a fax, a printer, a VCR, and/or multimedia conferencing equipment. The seriously self-contained will also want gear for exercise, leisure, and hobbies.

A functional work space is critical. If you don't already have a dedicated work space and in-basket, get them now. That goes for students, homemakers, and retirees, too. Everyone must have a physical locus of control from which to deal with everything else.

If I had to set up an emergency workstation in just a few minutes, I would buy a door, put it on top of two two-drawer filing cabinets (one at each end), place three stack-baskets on it, and add a legal pad and pen. That would be my home base (if I had time to sit down, I'd also buy a stool!). Believe it or not, I've been in several executive offices that wouldn't be as functional.

If You Go to an Office, You'll Still Need a Space at Home

Don't skimp on work space at home. As you'll discover through this process, it's critical that you have at least a satellite home

You must have a focused work space—at home, at work, and if possible even in

system identical to the one in your office. Many people I've worked with have been somewhat embarrassed by the degree of chaos that reigns in their homes, in contrast to their offices at work; they've gotten tremendous value from giving themselves permission to establish the same setup in both places.

If you're like many of them, you'll find that a week-end spent setting up a home workstation can make a revolutionary change in your ability to organize your life.

An Office Space in Transit

If you move around much, as a business traveler or just as a person with a mobile life-style, you'll also want to set up an efficiently organized micro-office-in-transit. More than likely this will consist of a briefcase, pack, or satchel with appropriate folders and portable workstation supplies.

Many people lose opportunities to be productive because they're not equipped to take advantage of the odd moments and windows of time that open up as they move from one place to another, or when they're in off-site environments. The combination of a good processing style, the right tools, and good interconnected systems at home and at work can make traveling a highly leveraged way to get certain kinds of work done.

Don't Share Space!

It is imperative that you have your own work space—or at least your own in-basket and a physical place in which to process paper. Too many married couples I've worked with have tried to work out of a single desk at home, and it always makes light-years of difference when they expand to two workstations. Far from being the "separation" they expect, the move in fact relieves them of a subtle stress in their relationship about managing the stuff of their shared lives. One couple even decided to set up an additional mini-workstation in the kitchen for the stay-at-home mom, so she could process work while keeping an eye on their infant in the family room.

Some organizations are interested in the concept of "hoteling"—that is, having people create totally self-contained and mobile workstation capabilities so they can "plug in" anywhere in the company, at any time, and work from there. I have my doubts about how well that concept will work in practice. A friend who was involved in setting up an "office of the future" model in Washington, D.C., for the U.S. government, claimed that hoteling tended to fall apart because of the "Mine!" factor—people wanted their *own* stuff. I suggest there's a deeper reason for the failure: there needs to be zero resistance at the less-than-conscious level for us to *use* the systems we have. Having to continually reinvent our in-basket, our filing system, and how and where we process our stuff can only be a source of incessant distraction.

You can work virtually everywhere if you have a clean, compact system and know how to process your stuff rapidly and portably. But you'll still need a "home base" with a well-grooved set of tools and sufficient space for all the reference and support material that you'll want somewhere close at hand when you "land." Most people I work with need at least four file drawers for their general-reference and project-support types of paper-based materials—and it's hard to imagine that all of that could ever be totally and easily movable.

It is critical that you have your own work space. You want to use your systems, not just think about them.

Getting the Tools You'll Need

If you're committed to a full implementation of this workflow process, there are some basic supplies and equipment that you'll need to get you started. As you go along, you're likely to dance between using what you're used to and evaluating the possibilities for new and different gear to work with.

Note that good tools don't necessarily have to be expensive. Often, on the low-tech side, the more "executive" something looks, the more dysfunctional it really is.

The Basic Processing Tools

Let's assume you're starting from scratch. In addition to a desktop work space, you'll need:

- Paper-holding trays (at least three)
- A stack of plain letter-size paper
- A pen/pencil
- Post-its (3X3s)
- Paper clips
- Binder clips
- A stapler and staples
- Scotch tape
- Rubber bands
- An automatic labeler
- File folders
- A calendar
- Wastebasket/recycling bins

Paper-Holding Trays

These will serve as your in-basket and out-basket, with one or two others for work-in-progress support papers and/or your "read and review" stack. The most functional trays are the side-facing letter or legal stackable kinds, which have no "lip" on them to keep you from sliding out a single piece of paper.

Plain Paper

You'll use plain paper for the initial collection process. Believe it or not, putting one thought on one full-size sheet of paper can have enormous value. Although most people will wind up processing their notes into some sort of list organizer, a few will actually stick with the simple piece-of-paper-per-thought system. In any case, it's important to have plenty of letter-size writing paper or tablets around to make capturing ad hoc input easy.

Post-its, Clips, Stapler, Etc.

Post-its, clips, stapler, tape, and rubber bands will come in handy for routing and storing paper-based materials. We're not finished with paper yet (if you haven't noticed!), and the simple tools for managing it are essential.

Moment-to-moment collecting, thinking, processing, and organizing are challenging enough; always ensure that you have the tools to make them as easy as possible.

The Labeler

The labeler is a surprisingly critical tool in our work. Thousands of executives and professionals and homemakers I have worked with now have their own automatic labelers, and my archives are full of their comments, like, "Incredible—I wouldn't have believed what a difference it makes!" The labeler will be used to label your file folders, binder spines, and numerous other things.

At this writing, I recommend the Brother labeler—it's the most user-friendly. Get the least expensive one that sits on a desk and has an AC adapter (so you won't have to worry about batteries). Also get a large supply of cassettes of label tape—black letters on white tape (instead of clear) are much easier to read and allow you to relabel folders you might want to reuse.

You can get software and printer sheets to make computer-generated labels, but I prefer the stand-alone tool. If you have to wait to do your filing or labeling as a batch job, you'll most likely resist making files for single pieces of paper, and it'll add the formality factor, which really puts the brakes on this system.

File Folders

You'll need plenty of file folders (get letter size if you can, legal size if you must). You may also need an equal number of Pendaflex-style file-folder hangers, if your filing system requires them. Plain manila folders are fine—color-coding is a level of complexity that's hardly ever worth the effort. Your general-reference filing system should just be a simple library.

Calendar

Although you may not need a calendar just to collect your incomplete items, you'll certainly come up with actions that need to be put there, too. As I noted earlier, the calendar should be used not

to hold action lists but to track the "hard landscape" of things that

have to get done on a specific day or at a specific time.

Most professionals these days already have some sort of working calendar system in place, ranging from pocket week-at-a-glance booklets, to loose-leaf organizers with day-, week-, month-, and year-at-a-glance options, to single-user software organizers, to group-ware calendars used companywide, like Outlook or Lotus Notes.

The calendar has often been the central tool that people rely

on to "get organized." It's certainly a critical component in managing particular kinds of data and reminders of the commitments that relate to specific times and days. There are many reminders and some data that you will want a calendar for, but you won't be stopping there: your calendar will need to be integrated with a much more comprehensive system that will emerge as you apply this method.

You may wonder what kind of calendar would be best for you to use, and I'll discuss that in more detail in the next chapter. For now, just keep using the one you've got. After you develop a feel for the whole systematic approach, you'll have a better reference point for deciding about graduating to a different tool.

Wastebasket/Recycling Bins

If you're like most people, you're going to toss a lot more stuff than you expect, so get ready to create a good bit of trash. Some executives I have coached have found it extremely useful to arrange for a large Dumpster to be parked immediately outside their offices the day we work together!

Do You Need an Organizer?

Whether or not you'll need an organizer will depend on a number of factors. Are you already committed to using one? How do you want to see your reminders of actions, agendas, and projects? Where and how often might you need to review them? Because your head is *not* the place in which to hold things, you'll obviously need *something* to manage your triggers. Once you know how gers externally. You could maintain everything in a to process your purely low-tech fashion, by keeping pieces of paper stuff and what to in folders. Or you could even use a paper-based note-organize, you really book or planner, or a digital version thereof. Or you just need to create could even employ some combination of these. and manage lists.

All of the low-tech gear listed in the previous section is used for various aspects of collecting, processing, and organizing. You'll use a tray and random paper for collecting. As you process your in-basket, you'll complete many less-than-two-minute actions that will require Post-its, a stapler, and paper clips. The magazines, articles, and long memos that are your longer-than-two-minute reading will go in another of the trays. And you'll probably have quite a bit just to file. What's left—maintaining a project inventory, logging calendar items and action and agenda reminders, and tracking the things you're waiting for—will require some form of *lists*, or reviewable groupings of similar items.

Lists can be managed simply in a low-tech way, as pieces of paper kept in a file folder (e.g., separate sheets/notes for each person you need to call in a "Calls" file), or they can be arranged in a more "mid-tech" fashion, in loose-leaf notebooks or planners (a page titled "Calls" with the names listed down the sheet). Or they can be high-tech, digital versions of paper lists (such a "Calls" category in the "To Do" section of a Palm PDA or in Microsoft Outlook "Tasks").

In addition to holding portable reference material (e.g., telephone/address info), most organizers are designed for managing

lists. (Your calendar is actually a form of a list—with time- and day-specific action reminders listed chronologically.) Probably thousands of types of organizers have been on the market since the 1980s, from the early rash of pocket Day-Timers to the current flood of high-tech personal digital assistants (PDAs) and PC-based software products like Microsoft Outlook and Lotus Notes.

One of the best tricks for enhancing your personal productivity is having organizing tools that you love to use. Should you implement the *Getting Things Done* process into what you're currently using, or should you install something new? The answer is, do whichever one will actually help you change your behavior so you'll use the tools appropriately. There are efficiency factors to consider here, too. Do you get a lot of digital information that would be easier to track with a digital tool? Do you need a paper-based calendar for all the appointments you have to make and change rapidly on the run? Do you need reminders of things like calls you have to make when it's not easy to carry file folders? And so on. There are also the aesthetic and enjoyment factors. I've done some of my best planning and updating for myself when I simply wanted some excuse to use (i.e., play with) my Palm organizer while waiting for dinner in a restaurant!

When considering whether to get and use an organizer, and if so, which one, keep in mind that all you really need to do is manage lists. You've got to be able to create a list on the run and review it easily and as regularly as you need to. Once you know what to put *on* the lists, and how to use them, the medium really doesn't matter. Just go for simplicity, speed, and fun.

The Critical Factor of a Filing System

If your filing system isn't fast, functional, and fun, you'll resist the whole process. A simple and highly functional personal reference system is critical to this process. The filing system at hand is the first thing I assess before beginning the workflow process in anyone's office. As I noted in chapter 2, the lack of a good general-reference system can be one of the greatest obstacles to imple-

menting a personal management system, and for most of the executives I have personally coached, it represents one of the biggest opportunities for improvement. Many times I have driven to the local office-supply store with a client and bought a filing cabinet, a big stock of file folders, and a labeler, just so we could create an appropriate place in which to put two-thirds of the "stuff" lying around his/her desk and credenza and even on the office floors.

We're concerned here mostly with general-reference filing—as distinct from discrete filing systems devoted to contracts, financial information, or other categories of data that deserve their own place and indexing. General-reference files should hold articles, brochures, pieces of paper, notes, printouts, faxes—basically anything that you want to keep for its interesting or useful data and that doesn't fit into your specialized filing systems and won't stand up by itself on a shelf (as will large software manuals and seminar binders).

If you have a trusted secretary or assistant who maintains that system for you, so you can put a "File as X" Post-it on the document and send it "out" to him or her, great. But ask yourself if you still have some personally interesting or confidential support material that should be accessible at any moment, even when your assistant isn't around. If so, you'll still need your own system, either in your desk or right beside it somewhere.

Success Factors for Filing

I strongly suggest that you maintain your own personal, at-hand filing system. It should take you less than one minute to pick something up out of your in-basket or print it from e-mail, decide it needs no action but has some potential future value, and finish storing it in a trusted system. If it takes you longer than a minute to complete that sequence of actions, you have a significant improvement opportunity, since you probably won't file the document; you'll stack it or stuff it instead. Besides being fast, the system needs to be fun and easy, current and complete. Otherwise you'll unconsciously resist emptying your in-basket because you

know there's likely to be something in there that ought to get filed, and you won't even want to look at the papers. Take heart: I've seen people go from resisting to actually *enjoying* sorting through their stacks once their personal filing system is set up and humming.

You must feel equally comfortable about filing a single piece of paper on a new topic—even a scribbled note—in its own file as

you would about filing a more formal, larger document. Because it requires so much work to make and organize files, people either don't keep them or have junked-up cabinets and drawers full of all sorts of one-of-a-kind items, like a menu for the local take-out cafe or the current train schedule.

Whatever you need to do to get your reference system to that quick and easy standard for everything it has to hold, do it. My system works wonderfully for me and for many others who try it, and I highly recommend that you consider incorporating all of the following guidelines to really make reference filing automatic.

Keep Your General-Reference Files at Hand's Reach Filing has to be instantaneous and easy. If you have to get up every time you have some ad hoc piece of paper you want to file, you'll tend to stack it instead of filing it, and you're also likely to just resist the whole in-basket process (because you subconsciously know there's stuff in there that might need *filing!*). Many people I have coached have redesigned their office space so they have four general-reference file drawers literally in "swivel distance," instead of across their room.

One Alpha System I have one A—Z alphabetical filing system, not multiple systems. People have a tendency to want to use their files as a personal organization system, and therefore they attempt to organize them by projects or areas of focus. This magnifies geometrically the number of places something *isn't* when you forget where you filed it. One simple alpha system files everything by topic, project, person, or company, so it can be in only three or four places if you forget exactly where you put it. You can usually

put at least one subset of topics on each label, like "Gardening—pots" and "Gardening—ideas." These would be filed under G.

Currently I have four file drawers for my general-reference files, and each is clearly marked on the outside—"A-E," "F-L," and so on—so I don't have to think about where something goes once it's labeled.

Every once in a while someone has such a huge amount of reference material on one topic or project that it should be put in its own discrete drawer or cabinet. But if it is less than a half a file drawer's worth, I recommended including it in the single general alphabetical system.

Have Lots of Fresh Folders I keep a giant stack of fresh, new file folders instantly at hand and reachable from where I sit to process my in-basket. Nothing is worse than having something to file and not having an abundance of folders to grab from to make the process easy. At any given time I want to have an inventory of almost half a file drawer full of unused or reusable folders. Rule of thumb: reorder when the number drops below a hundred.

Keep the Drawer Less Than Three-Quarters Full Always try to keep your file drawers less than three-quarters full. If they're stuffed, you'll unconsciously resist putting things in there, and reference materials will tend to stack up instead. If a drawer is starting to get tight, I may purge it while I'm on hold on the phone.

I know almost no one who doesn't have overstuffed file drawers. If you value your cuticles, and if you want to get rid of your unconscious resistance to filing, then you must keep the drawers loose enough that you can insert and retrieve files without effort.

Some people's reaction to this is "I'd have to buy more file cabinets!" as if that were something horrible. Help me out here. If the stuff is worth keeping, it's worth keeping so that it's easily accessible, right? And if it's not, then why are you keeping it? It's said that we're in the Information Age; if there's any validity to that, and if you're doing *anything* that hinders your usage of it... not smart.

You may need to create another tier of reference storage to give yourself sufficient working room with your general-reference files at hand. Material such as finished project notes and "dead" client files may still need to be kept, but can be stored off-site or at least out of your work space.

Label Your File Folders with an Auto Labeler Typeset labels change the nature of your files and your relationship to them. Labeled files feel comfortable on a boardroom table; everyone can identify them; you can easily see what they are from a distance and in your briefcase; and when you open your file drawers, you get to see what looks almost like a printed index of your files in alphabetical order. It makes it fun to open the drawer to find or insert things.

Perhaps later in this new millennium the brain scientists will give us some esoteric and complex neurological explanation for why labeled files work so effectively. Until then, trust me. Get a labeler. And get your *own*. To make the whole system work without a hitch, you'll need to have it *at hand* all the time, so you can file something whenever you want. And don't share! If you have something to file and your labeler's not there, you'll just stack the material instead of filing it. The labeler should be as basic a tool as your stapler.

Get High-Quality Mechanics File cabinets are not the place to skimp on quality. Nothing is worse than trying to open a heavy file drawer and hearing that awful *screech!* that happens when you wrestle with the roller bearings on one of those \$29.95 "special sale" cabinets. You really need a file cabinet whose drawer, even when it's three-quarters full, will glide open and click shut with the smoothness and solidity of a door on a German car. I'm not kidding.

Get Rid of Hanging Files If You Can At the risk of seriously offending a lot of people who are already using hanging files, I recommend that you totally do away with the hanging-file hardware and use just plain folders standing up by themselves in the

file drawer, held up by the movable metal plate in the back. Hanging folders are much less efficient because of the effort it takes to make a new file ad hoc and the formality that imposes on the filing system.

Here's an e-mail I received recently from a senior manager who actually took my advice after avoiding it for a couple of years because of his investment in the hanging hardware:

Your system is FANTASTIC!! I've completely redone my files at home and at work—it only took a combined four days to do it, but I've done away with Pendaflex and have gone to the manila folder system, with A-Z and nothing else. WOW! It's so much easier. My desk for some reason is a lot neater, too, without those stacks of "to be filed" stuff hanging around!

But If You Can't... Many people are stuck with the hanging-file system, at least at work, because side-opening hanging-folder filing cabinets have become standard corporate issue. If you have to work with hanging files, then I recommend that you:

- Label the files, not the hangers. That lets you carry the file folders for meetings and when traveling, without taking the hanger.
- Use only *one file folder per hanger*. This will keep the drawer visually neat and prevent the weirdness that results when multiple files make a hanger uneven. Having to recalibrate files in an alpha system every time a folder gets full is too much trouble.
- Keep a big supply of plain hangers and new file folders in the front of your first file drawer so you can make new files and store them in a flash.

In the fire zone of real work, if it takes longer than sixty seconds to file something, you won't file, you'll stack.

Purge Your Files at Least Once a Year Cleaning house in your files regularly keeps them from going stale and seeming like a black hole, and it also gives you the freedom to keep anything on a whim "in case you might need it." You know everything will be reassessed within a few months anyway, and you can redetermine then what's worth keeping and what isn't. As I say, I purge my files while I'm on hold on the phone (or marking time on a conference call that's dragging on and on!).

I recommend that all organizations (if they don't have one already) establish a Dumpster Day, when all employees get to come to work in sneakers and jeans, put their phones on do-not-disturb, and get current with all their stored stuff.* Dumpsters are brought in, and everyone has permission to spend the whole day in purge mode. A personal Dumpster Day is an ideal thing to put into your tickler file, either during the holidays, at year's end, or around early-spring tax-preparation time, when you might want to tie it in with archiving the previous year's financial files.

One Final Thing to Prepare . . .

You've blocked off some time, you've gotten a work area set up, and you've got the basic tools to start implementing the methodology. Now what?

If you've decided to commit a certain amount of time to setting up your workflow system, there's one more thing that you'll need to do to make it maximally effective: you must clear the decks of any other commitments for the duration of the session.

If there's someone you absolutely need to call, or something your secretary has to handle for you or you have to check with your spouse about, do it *now*. Or make an agreement with your-

*A great time to do this is Christmas Eve Day, or some similar near-holiday that falls on a workday. Most people are in "party mode" anyway, so it's an ideal opportunity to get funky and clean house.

self about when you *will do* it, and then put some reminder of that where you won't miss it. It's critical that your full psychic attention be available for the work at hand.

Almost without exception, when I sit down to begin coaching people, even though they've blocked out time and committed significant money to utilize me as a resource for that time, they still have things they're going to have to do before we quit for the day, and they haven't arranged for them yet in their own systems. "Oh, yeah, I've got to call this client back sometime today," they'll say, or "I have to check in with my spouse to see if he's gotten the tickets for tonight." It bespeaks a certain lack of awareness and maturity in our culture, I think, that so many sophisticated people are ignoring those levels of responsibility to their own psyche, on an ongoing operational basis.

So have you handled all that? Good. Now it's time to gather representatives of all of your open loops into one place.