

Reviewing: Keeping Your System Functional

THE PURPOSE OF this whole method of workflow management is *not* to let your brain become lax, but rather to enable it to move toward more elegant and productive activity. In order to earn that freedom, however, your brain must engage on some consistent basis with all your commitments and activities. You must be assured that you're doing what you need to be doing, and that it's OK to be *not* doing what you're not doing. Reviewing your system on a regular basis and keeping it current and functional are prerequisites for that kind of control.

If you have a list of calls you must make, for example, the minute that list is not totally current with *all* the calls you need to make, your brain will not trust the system, and it won't get relief from its lower-level mental tasks. It will have to take back the job of remembering, processing, and reminding, which, as you should know by now, it doesn't do very effectively.

All of this means your system cannot be static. In order to support appropriate action choices, it must be kept up to date. And it should trigger consistent and appropriate evaluation of your life and work at several horizons.

There are two major issues that need to be handled at this point:

- What do you look at in all this, and when?
- What do you need to do, and how often, to ensure that all of it works as a consistent system, freeing you to think and manage at a higher level?

A real review process will lead to enhanced and proactive new thinking in key areas of your life and work. Such thinking emerges from both focused concentration and serendipitous brainstorming, which will be triggered and galvanized by a consistent personal review of your inventory of actions and projects.

What to Look At, When

Your personal system and behaviors need to be established in such a way that you can see all the action options you need to see, *when* you need to see them. This is really just common sense, but few people actually have their processes and their organization honed to the point where they are as functional as they could be.

When you have access to a phone and any discretionary time, you ought to at least glance at the list of all the phone calls you need to make, and then either direct yourself to the best one to handle or give yourself permission to feel OK about not bothering with any of them. When you're about to go in for a discussion with your boss or your partner, take a moment to review the outstanding agendas you have with him or her, so you'll know that you're using your time most effectively. When you need to pick up something at the dry cleaner's, first quickly review all the other errands that you might be able to do en route.

A few seconds a day is usually all you need for review, as long as you're looking at the right things at the right time.

People often ask me, "How much time do you spend looking at your system?" My answer is simply, "As much time as I need to to feel comfortable about what I'm doing." In actuality it's an accumulation of two seconds here, three seconds there. What most people don't realize is that my lists are in one sense my office. Just as you might have Post-its and stacks of phone slips at your workstation, so do I on my "Next Actions" lists. Assuming that you've completely collected, processed, and organized your stuff, you'll most likely take only a

few brief moments here and there to access your system for day-to-day reminders.

Looking at Your Calendar First

Your most frequent review will probably be of your daily calendar, and your daily tickler folder if you're maintaining one, to see the "hard landscape" and assess what has to get done. You need to know the time-and-space parameters first. Knowing that you have wall-to-wall meetings from 8:00 A.M. through 6:00 P.M., for example, with barely a half-hour break for lunch, will help you make necessary decisions about any other activities.

... Then Your Action Lists

After you review all your day- and time-specific commitments and handle whatever you need to about them, your next most frequent area for review will be the lists of all the actions you could possibly do in your current context. If you're in your office, for instance, you'll look at your lists of calls, computer actions, and in-office things to do. This doesn't necessarily mean you will actually be *doing* anything on those lists; you'll just evaluate them against the flow of other work coming at you to ensure that you make the best choices about what to deal with. You need to feel confident that you're not missing anything critical.

Frankly, if your calendar is trustworthy and your action lists are current, they may be the only things in the system you'll need to refer to more than every couple of days. There have been many days when I didn't need to look at *any* of my lists, in fact, because it was clear from the front end—my calendar—what I *wouldn't* be able to do.

The Right Review in the Right Context

You may need to access any one of your lists at any time. When you and your spouse are decompressing at the end of the day, and you want to be sure you'll take care of the "business" the two of you manage together about home and family, you'll want to

look at your accumulated agendas for him or her. On the other hand, if your boss pops in for a face-to-face conversation about current realities and priorities, it will be highly functional for you to have your "Projects" list up to date and your "Agenda" list for him or her right at hand.

Updating Your System

The real trick to ensuring the trustworthiness of the whole organization system lies in regularly refreshing your psyche and your system from a more elevated perspective. That's impossible to do, however, if your lists fall too far behind your reality.

*To make
knowledge
productive, we
will have to learn
to see both forest
and tree. We will
have to learn to
connect.*

—Peter F.

You won't be able to fool yourself about this: if your system is out of date, your brain will be forced to fully engage again at the lower level of remembering.

This is perhaps the biggest challenge of all.

Once you've tasted what it's like to have a clear head and feel in control of everything that's going on, can you do what you need to to maintain that as an operational standard? The many years I've spent researching and implementing this methodology with countless people have proved to me that the magic key to the sustainability of the process is the Weekly Review.

The Power of the Weekly Review

If you're like me and most other people, no matter how good your intentions may be, you're going to have the world come at you faster than you can keep up. Many of us seem to have it in our natures consistently to entangle ourselves in more than we have the ability to handle. We book ourselves back to back in meetings all day, go to after-hours events that generate ideas and commitments we need to deal with, and get embroiled in engagements and projects that have the potential to spin our creative intelligence into cosmic orbits.

That whirlwind of activity is precisely what makes the Weekly Review so valuable. It builds in some capturing, reevaluation, and reprocessing time to keep you in balance. There is simply no way to do this necessary regrouping while you're trying to get everyday work done. You will invariably take in more opportunities than your system can process on a daily basis.

The Weekly Review will also sharpen your intuitive focus on your important projects as you deal with the flood of new input and potential distractions coming at you the rest of the week. You're going to have to learn to say no—faster, and to more things—in order to stay afloat and comfortable. Having some dedicated time in which to at least get up to the project level of thinking goes a long way toward making that easier.

What Is the Weekly Review?

Very simply, the Weekly Review is whatever you need to do to get your head empty again. It's going through the five phases of workflow management—collecting, processing, organizing, and reviewing all your outstanding involvements—until you can honestly say, "I absolutely know right now everything I'm not doing but could be doing if I decided to."

From a nitty-gritty, practical standpoint, here is the drill that can get you there:

Loose Papers Pull out all miscellaneous scraps of paper, business cards, receipts, and so on that have crept into the crevices of your desk, clothing, and accessories. Put it all into your in-basket for processing.

Process Your Notes Review any journal entries, meeting notes, or miscellaneous notes scribbled on notebook paper. List action items, projects, waiting-fors, calendar events, and someday/maybes, as appropriate. File any reference notes and materials. Stage your "Read/Renew" material. Be ruthless with yourself,

processing all notes and thoughts relative to interactions, projects, new initiatives, and input that have come your way since your last download, and purging those not needed.

Previous Calendar Data Review past calendar dates in detail for remaining action items, reference information, and so on, and transfer that data into the active system. Be able to archive your last week's calendar with nothing left uncaptured.

Upcoming Calendar Look at future calendar events (long- and short-term). Capture actions about arrangements and preparations for any upcoming events.

Empty Your Head Put in writing (in appropriate categories) any new projects, action items, waiting-fors, someday/maybes, and so forth that you haven't yet captured.

Review "Projects" (and Larger Outcome) Lists Evaluate the status of projects, goals, and outcomes one by one, ensuring that at least one current kick-start action for each is in your system.

Review "Next Actions" Lists Mark off completed actions. Review for reminders of further action steps to capture.

Review "Waiting For" List Record appropriate actions for any needed follow-up. Check off received items.

Review Any Relevant Checklists Is there anything you haven't done that you need to do?

Review "Someday/Maybe" List Check for any projects that may have become active and transfer them to "Projects." Delete items no longer of interest.

Review "Pending" and Support Files Browse through all work-in-progress support material to trigger new actions, completions, and waiting-fors.

Be Creative and Courageous Are there any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas you can add to your system?

This review process is common sense, but few of us do it as well as we could, and that means as regularly as we should to keep a clear mind and a sense of relaxed control.

The Right Time and Place for the Review
The Weekly Review is so critical that it behooves you to establish good habits, environments, and tools to support it. Once your comfort zone has been established for the kind of relaxed control that *Getting Things Done* is all about, you won't have to worry too much about making yourself do your review—you'll have to to get back to your personal standards again.

Until then, do whatever you need to, once a week, to trick yourself into backing away from the daily grind for a couple of hours—not to zone out, but to rise up at least to "10,000 feet" and catch up.

If you have the luxury of an office or work space that can be somewhat isolated from the people and interactions of the day, and if you have anything resembling a typical Monday-to-Friday workweek, I recommend that you block out two hours early every Friday afternoon for the review. Three factors make this an ideal time:

- The events of the week are likely to be still fresh enough for you to be able to do a complete postmortem ("Oh, yeah, I need to make sure I get back to her about...").

"Point of view"
is that quint-
essentially human
solution to
information
overload, an
intuitive process of
reducing things to
an essential
relevant and
manageable
minimum. . . . In
a world of
hyperabundant
content, point of
view will become
the scarcest of
resources.
—Paul

- When you (invariably) uncover actions that require reaching people at work, you'll still have time to do that before they leave for the weekend.
- It's great to clear your psychic decks so you can go into the weekend ready for refreshment and recreation, with nothing on your mind.

You may be the kind of person, however, who doesn't have normal weekends. I, for example, often have as much to do on Saturday and Sunday as on Wednesday. But I do have the luxury(?) of frequent long plane trips, which provide an ideal opportunity for me to catch up. A good friend and client of mine, an executive in the world's largest aerospace company, has his own Sunday-night ritual of relaxing in his home office and processing the hundreds of notes he's generated during his week of back-to-back meetings.

Whatever your life-style, you need a weekly regrouping ritual. You likely have something like this (or close to it) already. If so, leverage the habit by adding into it a higher-altitude review process.

The people who find it hardest to make time for this review are those who have constantly on-demand work and home environments, with zero built-in time or space for regrouping. The most stressed professionals I have met are the ones who have to be mission-critically reactive at work (e.g., high-level equities traders and chiefs of staff) and then go home to a couple of under-ten-year-old children and a spouse who also works. The more fortunate of them have a one-hour train commute.

If you recognize yourself in that picture, your greatest challenge will be to build in a consistent process of regrouping, when your world is not directly in your face. You'll need to either accept the requirement of an after-hours time at your desk on a Friday night or establish a relaxed but at-work kind of location and time at home.

Executive Operational Review Time I've coached many executives to block out two hours on their calendars on Fridays. For them the biggest problem is how to balance quality thinking and catch-up time with the urgent demands of mission-critical interactions. This is a tough call. The most senior and savvy of them, however, know the value of sacrificing the seemingly urgent for the truly important, and they create their islands of time for some version of this process.

Even the executives who have integrated a consistent reflective time for their work, though, often seem to give short shrift to the more mundane review and catch-up process at the "10,000-foot" level. Between wall-to-wall meetings and ambling around your koi pond with a chardonnay at sunset, there's got to be a slightly elevated level of reflection and regrouping required for operational control and focus. If you think you have all your open loops fully identified, clarified, assessed, and actionalized, you're probably kidding yourself.

Your best thoughts about work won't happen while you're at work.

Thinking is the very essence of and the most difficult thing to do in, business and in life. Empire builders spend hour-after-hour on mental work. . . while others party.

The "Bigger Picture" Reviews

Yes, at some point you must clarify the larger outcomes, the long-term goals, the visions and principles that ultimately drive and test your decisions.

What are your key goals and objectives in your work? What should you have in place a year or three years from now? How is your career going? Is this the life-style that is most fulfilling to you? Are you doing what you really want or need to do, from a deeper and longer-term perspective?

If you're not consciously aware of putting forth the effort to exert self-guided integrated thinking . . . then you're giving in to

The explicit focus of this book is not at those "30,000-" to "50,000+-foot" levels. Urging you to operate from a higher perspective is, however, its implicit purpose—to assist you in making your total

laziness and no longer control your life.
—David Kekich

life expression more fulfilling and better aligned with the bigger game we're all about. As you increase the speed and agility with which you clear the "runway" and "10,000-foot" levels of your life and work, be sure to revisit the other levels you're engaged in, now and then, to maintain a truly clear head.

How often you ought to challenge yourself with that type of wide-ranging review is something only you can know. The principle I must affirm at this juncture is this:

You need to assess your life and work at the appropriate horizons, making the appropriate decisions, at the appropriate intervals, in order to really come clean.

Which brings us to the ultimate point and challenge of all this personal collecting, processing, organizing, and reviewing methodology: It's 9:22 A.M. Wednesday morning—what do you do?

Doing: Making the Best Action Choices

WHEN IT COMES to your real-time, plow-through, get-it-done work-day, how do you decide what to do at any given point?

As I've said, my simple answer is, trust your heart. Or your spirit. Or, if you're allergic to those kinds of words, try these: your gut, the seat of your pants, your intuition. Ultimately and always you must trust your intuition.

That doesn't mean you throw your life to the winds—unless, of course, it does. I actually went down that route myself with some vengeance at one point in my life, and I can attest that the lessons were valuable, if not necessarily necessary.* There are many things you can do, however, that can increase that trust.

As outlined in chapter 2 (pages 48-53), I have found three priority frameworks to be enormously helpful in the context of deciding actions:

- The four-criteria model for choosing actions in the moment
- The threefold model for evaluating daily work
- The six-level model for reviewing your own work

*There are various ways to give it all up. You can ignore the physical world and its realities and trust in the universe. I did that, and it was a powerful experience. And one I wouldn't wish on anyone. Surrendering to your inner awareness, however, and its intelligence and practicality in the worlds you live in, is the higher ground. Trusting yourself and the source of your intelligence is a more elegant version of freedom and personal productivity.

These happen to be shown in reverse hierarchical order—that is, the reverse of the typical strategic top-down perspective. In keeping with the nature of the *Getting Things Done* methodology, I have found it useful to once again work from the bottom, up, meaning I'll start with the most mundane levels.

The Four-Criteria Model for Choosing Actions in the Moment

Remember that you make your action choices based on the following four criteria, in order:

- 1 | Context
- 2 | Time available
- 3 | Energy available
- 4 | Priority

Let's examine each of these in the light of how you can best structure your systems and behaviors to take advantage of its dynamics.

Context

At any point in time, the first thing to consider is, what could you possibly do, where you are, with the tools you have? Do you have a phone? Do you have access to the person you need to talk with face-to-face about three agenda items? Are you at the store where you need to buy something? If you can't do the action because you're not in the appropriate location or don't have the appropriate tool, don't worry about it.

As I've said, you should always organize your action reminders by context—"Calls," "At Home," "At Computer," "Errands," "Agenda for Joe," "Agenda for Staff Meeting," and so on. Since context is the first criterion that comes into play in your choice of actions, context-sorted lists prevent unnecessary

reassessments about what to do. If you have a bunch of things to do on one to-do list, but you actually can't do many of them in the same context, you force yourself to continually keep reconsidering *all* of them.

If you're stuck in traffic, and the only actions you can take are calls on your cell phone, you want to be able to pull out just your "Calls" list. Your action lists should fold in or out, based on what you could possibly do at any time.

A second real benefit accrues from organizing all your actions by the *physical* context needed: that in itself forces you to make the all-important determination about the next physical action on your stuff. All of my action lists are set up this way, so I have to decide on the very next physical action before I can know which list to put an item on (is this something that requires the computer? a phone? being in a store?). People who give themselves a "Misc." action list (i.e., one not specific to a context) often let themselves slide in the next-action decision, too.

I frequently encourage clients to structure their list categories early on as they're processing their in-baskets, because that automatically grounds their projects in the real things that need to get done to get them moving.

Time Available

The second factor in choosing an action is how much time you have before you have to do something else. If your meeting is starting in ten minutes, you'll most likely select a different action to do right now than you would if the next couple of hours were clear.

Obviously, it's good to know how much time you have at hand (hence the emphasis on calendar and watch). A total-life action-reminder inventory will give you maximum information about what you need to do, and make it much easier to match your actions to the windows you have. In other words, if you have ten minutes before that next meeting, find a ten-minute thing to do. If your lists have only the "big" or "important" things on them,

no item listed may be possible to handle in a ten-minute period. If you're going to have to do those shorter action things anyway, the most productive way to get them done is to utilize the little "weird time" windows that occur throughout the day.

Energy Available

*We all have times
•when we think
more effectively,
and times when
we should not be
thinking at all.*
—Daniel Cohen

Although you can increase your energy level at times by changing your context and redirecting your focus, you can do only so much. The tail end of a day taken up mostly by a marathon budget-planning session is probably not the best time to call a prospective client or start drafting a performance-review policy. It might be better to call the airline to change a reservation, process some expense receipts, or skim a trade journal.

Just as having all your next-action options available allows you to take advantage of various time slots, knowing about everything you're going to need to process and do at some point will allow you to match productive activity with your vitality level.

I recommend that you always keep an inventory of things that need to be done that require very little mental or creative horsepower. When you're in one of those low-energy states, do them. Casual reading (magazines, articles, and catalogs), telephone/address data that need to be inputted onto your computer, file purging, backing up your laptop, even just watering your plants and filling your stapler—these are some of the myriad things that you've got to deal with sometime anyway.

*There is no reason
not to be highly
productive, even
when you're not in
top form.*

This is one of the best reasons for having very clean edges to your personal management system: it makes it easy to continue doing productive activity when you're not in top form. If you're in a low-energy mode and your reading material is disorganized, your receipts are all over the place, your filing system is chaotic, and your in-basket is dysfunctional, it just

seems like too much work to do to find and organize the tasks at hand; so you simply avoid doing anything at all and then you feel even *worse*. One of the best ways to increase your energy is to close some of your loops. So always be sure to have some easy loops to close, right at hand.

These first three criteria for choosing action (context, time, and energy) bespeak the need for a complete next-action reminder system. Sometimes you won't be in a mode to do that kind of ■ thinking; it needs to have already been done. If it is, you can operate much more "in your zone" and choose from delineated actions that fit the situation.

Priority

Given the context you're in and the time and energy you have, the obvious next criterion for action choice is relative priority: "Out of all my remaining options, what is the most important thing for me to do?"

"How do I decide my priorities?" is a question I frequently hear from people I'm working with. It springs from their experience of having more on their plate to do than they can comfortably handle. They know that some hard choices have to be made, and that some things may not get done at all. It is impossible to feel good about your choices unless you are clear about what your work really is.

At the end of the day, in order to feel good about what you didn't get done, you must have made some conscious decisions about your responsibilities, goals, and values. That process invariably includes an often complex interplay with the goals, values, and directions of your organization and of the other significant people in your life, and with the importance of those relationships to you.

The Threefold Model for Evaluating Daily Work

Setting priorities assumes that some things will be more important than others, but important relative to what? In this context, the answer is, to your work—that is, the job you have accepted from yourself and/or from others. This is where the next two frameworks need to be brought to bear in your thinking. They're about defining your work. Keep in mind that though much of this methodology will be within the arena of your professional focus, I'm using "work" in the universal sense, to mean anything you have a commitment to making happen, personally as well as professionally.

These days, daily work activity itself presents a relatively new type of challenge to most professionals, something that it's helpful to understand as we endeavor to build the most productive systems. As I explained earlier, during the course of the workday, at any point in time, you'll be engaged in one of three types of activities:

- Doing predefined work
- Doing work as it shows up
- Defining your work

You may be doing things on your action lists, doing things as they come up, or processing incoming inputs to determine what work that needs to be done, either then or later, from your lists.

This is common sense. But many people let themselves get wrapped around the second activity—dealing with things that show up ad hoc—much too easily, and let the other two slide, to their detriment.

Let's say it's 10:26 A.M. Monday, and you're in your office. You've just ended a half-hour unexpected phone call with a prospective client. You have three pages of scribbled notes from the conversation. There's a meeting scheduled with your staff at

eleven, about half an hour from now. You were out late last night with your spouse's parents and are still a little frayed around the edges (you told your father-in-law you'd get back to him about. . . what?). Your assistant just laid six telephone messages in front of you. You have a major strategic-planning session coming up in two days, for which you have yet to formulate your ideas. The oil light in your car came on as you drove to work this morning. And your boss hinted as you passed her earlier in the hall that she'd like your thoughts on the memo she e-mailed you yesterday, before this afternoon's three o'clock meeting.

Are your systems set up to maximally support dealing with this reality, at 10:26 on Monday morn- It is often easier to ing? If you're still keeping things in your head, and if get wrapped up in you're still trying to capture only the "critical" stuff on the urgent demands of the moment than your lists, I suggest that the answer is no. to deal with your in-basket, e-mail, and the rest of your open loops.

I've noticed that people are actually more comfortable dealing with surprises and crises than they are taking control of processing, organizing, reviewing, and assessing that part of their work that is *not* as self-evident. It's easy to get sucked into "busy" and "urgent" mode, especially when you have a lot of unprocessed and relatively out-of-control work on your desk, in your e-mail, and on your mind.

In fact, much of our life and work just shows up in the moment, and it usually becomes the priority when it does. It's indeed true for most professionals that the nature of their job requires them to be instantly available to handle new work as it appears in many forms. For instance, you need to pay attention to your boss when he shows up and wants a few minutes of your time. You get a request from a senior executive that suddenly takes precedence over anything else you thought you needed to do today. You find out about a serious problem with fulfilling a major customer's order, and you have to take care of it right away.

These are all understandable judgment calls. But the angst

begins to mount when the other actions on your lists are not reviewed and renegotiated by you or between you and everyone else. The constant sacrifices of not doing the work you have defined on your lists can be tolerated only if you *know* what you're not doing. That requires regular processing of your in-basket (defining your work) and consistent review of complete lists of all your predetermined work.

If choosing to do work that just showed up instead of doing work you predefined is a conscious choice, based on your best call, that's playing the game the best way you can. Most people, however, have major improvements to make in how they clarify, manage, and renegotiate their total inventory of projects and actions. If you let yourself get caught up in the urgencies of the moment, without feeling comfortable about what you're *not* dealing with, the result is frustration and anxiety. Too often the stress and lowered effectiveness are blamed on the "surprises." If you know what you're doing, and what you're *not* doing, surprises are just another opportunity to be creative and excel.

In addition, when the in-basket and the action lists get ignored for too long, random things lying in them tend to surface as emergencies later on, adding more ad hoc work-as-it-shows-up to fuel the fire.

Many people use the inevitability of an almost infinite stream of immediately evident things to do as a way to avoid the responsibilities of defining their work and managing their total inventory. It's easy to get seduced into not-quite-so-critical stuff that is right at hand, especially if your in-basket and your personal organization are out of control. Too often "managing by wandering around" is an excuse for getting away from amorphous piles of stuff.

This is where the need for knowledge-work athletics really shows up. Most people did not grow up in a world where defining the edges of work and managing huge numbers of open loops were required. But when you've developed the skill and, habits of processing input rapidly into a rigorously defined system, it becomes

much easier to trust your judgment calls about the dance of what to do, what to stop doing, and what to do instead.

The Moment-to-Moment Balancing Act

At the black-belt level, you can shift like lightning from one foot to the other and back again. While you're processing your in-basket, for example, your assistant comes in to tell you about a situation that needs immediate attention. No sweat—your tray is still there, with everything still to be processed in one stack, ready to be picked up again when you can get back to it. While you're on hold on the phone, you can be reviewing your action lists and getting a sense of what you're going to do when the call is done. While you wait for a meeting to start, you can work down the "Read/Review" stack you've brought with you. And when the conversation you weren't expecting with your boss shrinks the time you have before your next meeting to twelve minutes, you can easily find a way to use that window to good advantage.

To ignore the unexpected (even if it were possible) would be to live without opportunity, spontaneity, and the rich moments of which "life" is made.

—Stephen Covey

You can do only one of these work activities at a time. If you stop to talk to someone in his or her office, you're not working off your lists or processing incoming stuff. The challenge is to feel confident about what you have decided to do.

So how do you decide? This again will involve your intuitive judgments—how important is the unexpected work, against all the rest? How long can you let your in-basket go unprocessed and all your stuff unreviewed and trust that you're making good decisions about what to do?

People often complain about the interruptions that prevent them from doing their work. But interruptions are unavoidable in life. When you become elegant at dispatching what's coming in and are organized enough to take advantage of the "weird time" windows that show up, you can switch between one task and the other rapidly. You can be processing e-mails while you're on hold