

## Collection: Corralling Your "Stuff"

IN CHAPTER 2 I described the basic procedures for *collecting* your work. This chapter will lead you in more detail through the process of getting all your incompletes, all your "stuff," into one place—into "in." That's the critical first step in getting to the state of "mind like water." Just gathering a few more things than you currently have will probably create a positive feeling for you. But if you can hang in there and really do the whole collection process, 100 percent, it will change your experience dramatically and give you an important new reference point for being on top of your work.

When I coach a client through this process, the collection phase usually takes between one and six hours, though it did take all of twenty hours with one person (finally I told him, "You get the idea"). It can take longer than you think if you are committed to a full-blown capture that will include everything at work and everywhere else. That means going through every storage area and every nook and cranny in every location, including cars, boats, and other homes, if you have them.

Be assured that if you give yourself at least a couple of hours to tackle this part, you can grab the major portion of things outstanding. And you can even capture the rest by creating relevant placeholder notes—for example, "Purge and process boat storage shed" and "Deal with hall closet."

In the real world, you probably won't be able to keep your stuff 100 percent collected all of the time. If you're like most people, you'll move too fast and be engaged in too many things dur-

ing the course of a week to get all your ideas and commitments captured outside your head. But it should become an ideal standard that keeps you motivated to consistently "clean house" of all the things about your work and life that have your attention.

## Ready, Set. . .

There are very practical reasons to gather everything before you start *processing* it:

- 1 | it's helpful to have a sense of the volume of stuff you have to deal with;
- 2 | it lets you know where the "end of the tunnel" is; and
- 3 | when you're *processing* and *organizing*, you don't want to be distracted psychologically by an amorphous mass of stuff that might still be "somewhere." Once you have all the things that require your attention gathered in one place, you'll automatically be operating from a state of enhanced focus and control.

It can be daunting to capture into one location, at one time, all the things that don't belong where they are. It may even seem a little counterintuitive, because for the most part, most of that stuff was not, and is not, "that important"; that's why it's still lying around. It wasn't an urgent thing when it first showed up, and probably nothing's blown up yet because it hasn't been dealt with. It's the business card you put in your wallet of somebody you thought you might want to contact sometime. It's the little piece of techno-gear in the bottom desk drawer that you're missing a part for. It's the printer that you keep telling yourself you're going to move to a better location in your office. These are the kinds of things that nag at you but that you haven't decided either to deal with or to drop entirely from your list of open loops. But because you think there still *could* be something important in there, that

"stuff" is controlling *you* and taking up more psychic energy than it deserves. Keep in mind, you can feel good about what you're not doing, only when you *know* what you're not doing.

So it's time to begin. Grab your in-basket and a half-inch stack of plain paper for your notes, and let's . . .

## ... Go!

### Physical Gathering

Train yourself to notice and collect anything that doesn't belong where it is forever.

The first activity is to search your physical environment for anything that doesn't belong where it is, the way it is, permanently, and put it into your in-basket. You'll be gathering things that are incomplete, things that have some decision about potential action tied to them. They all go into "in," so they'll be available for later processing.

### What Stays Where It Is

The best way to create a clean decision about whether something should go into the in-basket is to understand clearly what *shouldn't* go in. Here are the four categories of things that can remain where they are, the way they are, with no action tied to them:

- Supplies
- Reference material
- Decoration
- Equipment

*Supplies* . . . include anything you need to keep because you use it regularly. Stationery, business cards, stamps, staples, Post-it pads, legal pads, paper clips, ballpoint refills, batteries, forms you need to fill out from time to time, rubber bands—all of these qualify. Many people also have a "personal supplies" drawer at work containing dental floss, Kleenex, breath mints, and so on.

*Reference Material* . . . is anything you simply keep for information as needed, such as manuals for your software, the local take-out deli menu, or your kid's soccer schedule. This category includes your telephone and address information, any material relevant to projects, themes, and topics, and sources such as dictionaries, encyclopedias, and almanacs.

*Decoration* . . . means pictures of family, artwork, and fun and inspiring things pinned to your bulletin board. You also might have plaques, mementos, and/or plants.

*Equipment* . . . is obviously the telephone, computer, fax, printer, wastebasket, furniture, and/or VCR.

You no doubt have a lot of things that fall into these four categories—basically all your tools and your gear, which have no actions

tied to them. Everything else goes into "in." But many of the things you might initially interpret as supplies, reference, decoration, or equipment could also have action associated with them because they still aren't exactly the way they need to be.

For instance, most people have, in their desk drawers and on their credenzas and bulletin boards, a lot of reference materials that either are out of date or need to be organized somewhere else. Those should go into "in." Likewise, if your supplies drawer is out of control, full of lots of dead or unorganized stuff, that's an incomplete that needs to be captured. Are the photos of your kids *current* ones? Is the artwork what you *want* on the wall? Are the mementos really something you still want to keep? Is the furniture precisely the way it should be? Is the computer set up the way you want it? Are the plants in your office alive? In other words, supplies, reference materials, decoration, and equipment *may* need to be tossed into the in-basket if they're not just where they should be, the way they should be.

### Issues About Collecting

As you engage in the collecting phase, you may run into one or more of the following:

- you've got a lot more than will fit into one in-basket;
- you're likely to get derailed into purging and organizing;
- you may have some form of stuff already collected and organized; and/or
- you're likely to run across some critical things that you want to keep in front of you.

*What If an Item Is Too Big to Go in the In-Basket?* If you can't physically put something in the in-basket, then write a note on a piece of letter-size plain paper to represent it. For instance, if you have a poster or other piece of artwork behind the door to your office, just write "Artwork behind door" on a letter-size piece of paper and put the paper in the in-basket.

Be sure to date it, too. This has a couple of benefits. If your organization system winds up containing some of these pieces of paper representing something else, it'll be useful to know when the note was created. It's also just a great habit to date everything you hand-write, from Post-it notes to your assistant, to voice-mails you download onto a pad, to notes you take on a phone call with a client. The 3 percent of the time that this little piece of information will be extremely useful makes it worth developing the habit.

*What If the Pile Is Too Big to Fit into the In-Basket?* If you're like 98 percent of my clients, your initial gathering activity will collect much more than can be comfortably stacked in an in-basket. If that's the case, just create stacks around the in-basket, and maybe even on the floor underneath it. Ultimately you'll be emptying the in-stacks, as you process and organize everything. In the meantime, though, make sure that there's some obvious visual distinction between the stacks that are "in" and everything else.

*Instant Dumping* If it's immediately evident that something is trash, go ahead and toss it when you see it. For some of my clients, this marks the first time they have ever cleaned their center desk drawer!

If you're not sure what something is or whether it's worth keeping, go ahead and put it into "in." You'll be able to decide about it later, when you process the in-basket. What you *don't* want to do is to let yourself get wrapped up in things piece by piece, *trying* to decide this or that. You'll do that later anyway if it's in "in," and it's easier to make those kinds of choices when you're in processing mode. The objective for the collection process is to get everything into "in" *as quickly as possible* so you've appropriately retrenched and "drawn the battle lines."

*Be Careful of the Purge-and-Organize Bug!* Many people get hit with the purge-and-organize virus as they're going through various areas of their office (and their home). If that happens to you, it's OK, so long as you have a major open window of time to get through the whole process (like at least a whole week ahead of you). Otherwise you'll need to break it up into chunks and capture them as little projects or actions to do, with reminders in your system, like "Purge four-drawer cabinet" or "Clean office closet." What you *don't* want to do is let yourself get caught running down a rabbit trail cleaning up some piece of your work and then not be able to get through the whole action-management implementation process. It may take longer than you think, and you want to go for the gold and finish processing all your stuff and setting up your system as soon as possible.

*What About Things That Are Already on Lists and in Organizers?* You may already have some lists and some sort of organization system in place. But unless you're thoroughly familiar with this workflow-processing model and have implemented it previously, I recommend that you treat those lists as items still to be processed, like everything else in "in." You'll want your system to be

consistent, and it'll be necessary to evaluate everything from the same viewpoint to get it that way.

*"But I Can't Lose That Thing . . .!"* Often in the collection process someone will run across a piece of paper or a document that causes her to say, "Oh, my God! I forgot about that! I've *got* to deal with that!" It could be a phone slip with a return call she was supposed to handle two days before, or some meeting notes that remind her of an action she was supposed to take weeks ago. She doesn't want to put whatever it is into the huge stack of other stuff in her in-basket because she's afraid she might lose track of it again.

If that happens to you, first ask yourself if it's something that really *has* to be handled before you get through this initial implementation time. If so, best deal with it immediately so you get it off your mind. If not, go ahead and put it into "in." You're going to get all that processed and emptied soon anyway, so it won't be lost.

If you can't deal with the action in the moment, and you still just *have* to have the reminder right in front of you, go ahead and create an "emergency" stack somewhere close at hand. It's not an ideal solution, but it'll do. Keep in mind that some potential anxiousness is going to surface as you make your stuff more conscious to you than it's been. Create whatever supports you need.

### Start with Your Desktop

Ready now? OK. Start piling those things on your desk into "in." Often there'll be numerous things right at hand that need to go in

there. Many people use their whole desktop as "in"; if you're one of them, you'll have several stacks around you to begin your "in" collection with. Start at one end of your work space and move around, dealing with everything on every cubic inch. Typical items will be:

- Stacks of mail and memos
- Phone slips

- Collected business cards
- Notes from meetings

Resist the urge to say, as almost everyone does initially, "Well, I know what's in that stack, and that's where I want to leave it." That's *exactly* what hasn't worked before, and it all needs to go into the in-basket.

As you go around your desktop, ask yourself if you have any intention of changing any of the tools or equipment there. Is your phone OK? Your computer? The desk itself? If anything needs changing, write a note about it and toss it into "in."

### Desk Drawers

Next tackle the desk drawers, if you have them, one at a time. Any attention on anything in there? Any actionable items? Is there anything that doesn't belong there? If the answer to any of these questions is yes, put the actionable item into "in" or write a note about it. Again, whether you use this opportunity to clean and organize the drawers or simply make a note to do it later will depend on how much time you have and how much stuff is in there.

### Countertops

Continue working your way around your office, collecting everything sitting on the tops of credenzas or counters or cabinets that doesn't belong there permanently. Often there will be stacks of reading material, mail, and miscellaneous folders and support material for actions and projects. Collect it all.

Maybe there is reference material that you've already used and just left out. If that's so, and if you can return it to the file cabinet or the bookshelf in just a second, go ahead and do that. Be careful to check with yourself, though, about whether there is some potential action tied to the material before you put it away. If there is, put it into "in" so you can deal with it later in the process.

### Inside the Cabinets

Now look inside the cabinets. What's in there? These are perfect areas for stashing large supplies and reference materials, and equally seductive for holding deeper levels of stuff.

Consider whether your collectible and nostalgia items are still meaningful to you.

Any broken or out-of-date things in there? Often I'll find collectibles and nostalgia that aren't meaningful to my clients any longer. One general manager of an insurance office, for example, wound up tossing out at least a small Dumpster's worth of "recognition" awards he had accumulated over the years.

Again, if some of these areas are out of control and need purging and organizing, write that on a note and toss it into "in."

### Floors, Walls, and Shelves

Anything on bulletin boards that needs action? Anything tacked onto the walls that doesn't belong there? Any attention on your pictures, artwork, plaques, or decorations? How about the open shelves? Any books that need to be read or donated? Any catalogs, manuals, or three-ring binders that are out of date or have some potential action associated with them? Any piles or stacks of things on the floor? Just scoot them over next to your in-basket to add to the inventory.

### Equipment, Furniture, and Fixtures

Is there anything you want to do to or change about any of your office equipment or furniture or the physical space itself? Does everything work? Do you have all the lighting you need? If there are actionable items, you know what to do: make a note and put it in "in."

### Other Locations

Depending on the scope of what you're addressing in this process, you may want to do some version of the same kind of gathering anywhere else you keep stuff. If you're determined to get to a really empty head, it's imperative that you do it *everywhere*.

Some executives I work with find it immensely valuable to take me home with them and have me walk them through this process there as well. Often they've allowed the "not so important" trap to ensnare them in their home life, and it has gnawed away at their energy.

Don't let the "not so important" trap gnaw away your energy at home.

### Mental Gathering: The Mind-Sweep

Once you feel you've collected all the physical things in your environment that need processing, you'll want to collect anything else that may be residing in your psychic RAM. What has your attention that isn't represented by something already in your in-basket?

This is where the stack of plain paper really comes into play. I recommend that you write out each thought, each idea, each project or thing that has your attention, on a *separate sheet of paper*. You could make one long list on a pad, but given how you will later be processing each item individually, it's actually more effective to put everything on separate sheets. You will likely not keep these pieces of paper (unless you decide that low-tech is your best organizing method), but it'll be handy to have them as discrete items to deal with as you're processing.

It will probably take you between twenty minutes and an hour to clear your head onto separate notes, *after* you've gathered everything else. You'll find that things will tend to occur to you in somewhat random fashion—little things, big things, personal things, professional things, in no particular order.

In this instance, go for quantity. It's much better to overdo this process than to risk missing something. You can always toss the junk later. Your first idea may be "Save the ozone layer," and then you'll think, "I need cat food!" Grab them all. Don't be surprised if you discover you've created quite a stack of paper in "in" during this procedure.

## "Trigger" List

To assist in clearing your head, you may want to review the following "Incompletion Triggers" list, item by item, to see if you've forgotten anything. Often you'll just need a jog to unearth something lurking in a corner of your mind. Remember, when something occurs to you, write it on a piece of paper and toss it into "in."

## "Incompletion Triggers" List

### **Professional**

Projects started, not completed	Evaluations/reviews
Projects that need to be started	Proposals
Commitments/promises to others	Articles
Boss/partners	Promotional materials
Colleagues	Manuals/instructions
Subordinates	Rewrites and edits
Other people in organization	Meetings that need to be set/requested
"Outside" people	Who needs to know about what decisions?
Customers	
Other organizations	Significant read/review
Professionals	Financial
Communications to make/get ,	Cash flow
Internal/External	Statistics
Initiate or respond to:	Budgets
Phone calls	Forecasts/projections
Voice-mail	P&Ls
E-mail	Balance sheet
Pages	Credit line
Faxes	Planning/organizing
Letters	Formal planning (goals, targets, objectives)
Memos	
Other writing to finish/submit	Current projects (next stages)
Reports	Upcoming projects

Business/marketing plans	Supplies
Organizational initiatives	Office/site
Upcoming events	Office organization
Meetings	, Furniture
Presentations	Decorations
Organizational structuring	Waiting for...
Changes in facilities	Information
Installation of new systems/equipment	Delegated tasks/projects
Travel	Completions critical to projects
Banks	Replies to:
Receivables	Letters
Payables	Memos
Petty cash	Calls
Administration	Proposals
Legal issues	Requisitions
Insurance	Reimbursements
Personnel	Petty cash
Policies/procedures	Insurance
Customers	Ordered items
Internal	Items being repaired
External	Tickets
Marketing	Decisions of others
Promotion	Professional development
Sales	Training/seminars
Customer service	Things to learn
Systems	Things to look up
Phones	Skills to practice/learn especially re:
Computers	computers
Office equipment	Tape/video training
Other equipment	Resumes
Utilities	Outside education
Filing	Research— need to find out about...
Storage	Professional wardrobe
Inventories	

**Personal**

Projects started, not completed	R&D— things to do
Projects that need to be started	Places to go
Commitments/promises to others	People to meet/invite
Spouse	Local attractions
Children	Administration
Family	Financial
Friends	Bills
Professionals	Banks
Borrowed items	Investments
Projects: other organizations	Loans
Service	Taxes
Civic	Insurance
Volunteer	Legal affairs
Communications to make/get	Filing
Family	Waiting for...
Friends	Mail order
Professional	Repair
Initiate or respond to:	Reimbursements
Phone calls	Loaned items
Letters	Medical data
Cards	RSVPs
Upcoming events	Home/household
Special occasions	Landlords
Birthdays	Property ownership
Anniversaries	Legal
Weddings	Real estate
Graduations	Zoning
Holidays .	Taxes
Travel	Builders/contractors
Weekend trips	Heating/air-conditioning
Vacations	Plumbing
Social events	Electricity
Cultural events	Roofing
Sporting events	Landscape

Driveway	Garage/storage
Walls/floors/ceilings	Vehicle repair/maintenance
Decoration	Tools
Furniture	Luggage
Utilities	Pets
Appliances	Health care
Lightbulbs/wiring	Doctors
Kitchen things	Dentists
Washer/dryer/vacuum	Specialists
Areas to organize/clean	Hobbies
Computers	Books/records/tapes/disks
Software	Errands
Hardware	Hardware store
Connections	Drugstore
CD-ROM	Market
E-mail/Internet	Bank
TV	Cleaner
VCR	Stationer
Music/CDs/tapes	Community
Cameras/film	Neighborhood
Phones	Schools
Answering machine	Local government
Sports equipment	Civic issues
Closets/clothes	

## The "In" Inventory

If your head is empty of everything, personally and professionally, then your in-basket is probably quite full, and likely spilling over. In addition to the paper-based and physical items in your in-basket, your inventory of "in" should include any resident voice-mails and all the e-mails that are currently staged in the "in" area of your communication software. It should also include any items

on your organizer lists for which you have not yet determined next actions.

Connection is completed when you can easily see the edges to the inventory of everything that is complete.

I usually recommend that clients download their voice-mails onto paper notes and put those into their in-baskets, along with their whole organizer notebooks, which usually need significant reassessment. If you've been using something like a Palm PDA or Microsoft Outlook or Lotus Organizer for anything other than calendar and telephone/address functionality, I suggest you print out any task and to-do lists and put them, too, into your in-basket. E-mails are best left where they are, because of their volume and the efficiency factor of dealing with them within their own minisystem.

### **But "In" Doesn't Stay in "In"**

When you've done all that, you're ready to take the next step. You don't want to leave anything in "in" for an indefinite period of time, because then it would without fail creep back into your psyche again, since your mind would know you weren't dealing with it. Of course, one of the main factors in people's resistance to collecting stuff into "in" is the lack of a good processing and organizing methodology to handle it.

That brings us to the next chapter: "Getting 'In' to Empty."