ULTIMATE GUIDE TO AN EFFECTIVE WEEKLY REVIEW

BY JUSTIN DIROSE OF *EFFECTIVE REMOTE WORK*

The Ultimate Guide to an Effective Weekly Review

Written by Justin DiRose,
Brought to you by Effective Remote Work

The weekly review is the cornerstone habit to keep for anyone looking to stay productive and focused. It will help you get a clear head, see every commitment currently on your plate, and help you make decisions that ultimately lead you to be more intentional and focused over the upcoming week.

But if you're like me, the weekly review hasn't always been clear. What do I check in it? How do I review my projects? What does it even mean to review my calendar? Many of us productivity experts will tell you all of the high level things to do in a review, but sometimes we leave out the details.

Whether you're new to productivity or a seasoned veteran, my hope for this guide is to leave you with the following outcomes:

- a deeper understanding of what a review is,
- a foundation of core focuses in the review and what they mean,
- and tips to help you incorporate the weekly review into your routine.

What is the weekly review?

We've briefly touched on this subject already, but essentially the weekly review is a set aside time each week (hence weekly, right?) where you get a top down view of your current commitments and ensure everything you're tracking in your productivity system is accurate.

Essentially the review accomplishes two goals.

First, it keeps your system up to date.

My main hope when first starting out in productivity systems was to be able to set it and forget it. Just enter in the tasks, keep working, and have the system just tell me what to work on next. Sounds like a great goal, right?

The thing is that, just like a garden, a productivity system needs regular tending to ensure its effectiveness. Think about it. If you let a garden go for weeks without tending to it, what's the result? Weeds. Animals eating the growth. Dead plants. Regular tending to the garden aims to create a healthy ecosystem for plants to grow through regular weeding, watering, and ensuring the garden is properly fenced and protected.

A weekly review serves a similar purpose. Productivity systems easily get out of date without regular reviewing. And when the system is not accurate, you wrong trust it. And if you can't trust it, you won't use it.

Performing a weekly review on a consistent basis will help you make sure everything in your system is current so you can keep leaning on it to be effective for you.

Second, the review looks back on the previous week to help you prepare for the upcoming one.

When the system is current, you get a clear picture of the tasks, projects, commitments, and responsibilities on your plate at that exact moment in time. That clarity enables you to make better decisions on how to spend your time over the next week.

I regularly use my productivity system to help me decide where to focus my resources in the upcoming seven days. Let's face it – we have limited time, attention, and energy. It would be unfortunate for me to use those finite resources that I'm wholly in control of in a haphazard and unintentional manner, essentially wasting them.

In that order, the weekly review helps you see and set your priorities so you can make better choices to spend the finite resources of your life in the moments of the next week.

You could call this planning. I like to see it as preparation and making decisions in advance. So often planning gets associated with rigid schedules, inflexible action plans, and – here's what always bites me – an uncanny ability to never happen as hoped.

That's not to say "planning" isn't valuable, but the value isn't found in the plan produced. It's found in the preparation. And the weekly review enables the level of preparation needed to effectively handle the upcoming week.

What shouldn't I do in my weekly review?

The weekly review is just that: weekly. It's suited for particular types of tasks and focuses that help you review the week. There are some things to avoid doing in the weekly review because of that.

Don't evaluate your long term plan effectiveness. You might have goals or a theme you're pursuing for the next year or 12 weeks or whatever timespan it is. The weekly review is not the time to decide if that's a good goal for you or not.

Longer term goals take time to meet. As a result, the week is often an ineffective timescale to view progress in. Say your goal is to lose 10 pounds. You might weigh yourself weekly (which is good to do). The first week you weigh 200lbs. Next week 199lbs. The week after that 203lbs. There are two approaches to evaluating these datapoints.

1. You take the measurements, see negative change, and get discouraged.
2. You take the measurements, and move on.

Option one is what I like to call a short term evaluation of a long term goal. It takes time to lose weight. But when you evaluate your progress based upon the week to week results, it's super easy to get discouraged and decide it's not worth it to pursue that goal.

Instead, progress is best measured in months or even years. In that respect, the weekly review may not be the best place to evaluate your progress, though it can be a great place to review your goals simply to keep them top of mind.

The weekly review is also not the best place to do work. This is your time to plan, refocus yourself, and ensure the accuracy of your system – don't pollute that time with doing work!

Obviously this is a best effort suggestion as there are times you will need to do something in the middle of your review. But the truth is that your brain likely doesn't handle planning and acting in the same mode of thinking very well. I know mine doesn't.

When I start my weekly review, I need to make sure I'm out of any inboxes that could distract me unless I'm ready to process them. Why? Inboxes are the place where work shows up. If I'm drawn into a new shiny piece of information to deal with when I've decided to be reviewing, I've just broken my focus on the task at hand and it's going to take me a while to get back on track.

When I'm able to to shut off all the distractions and possibly change my environment by going to a coffee shop or park to do the review, it enables me to enter the administrative mode of thinking I require to make my regular review work.

— When to do it? —

A weekly review is weekly right? Shouldn't that be easy?

Well true! But there are a few items to consider in deciding when to do your weekly review.

Consistency is the key here. Pick a time you can consistently show up and do the review. If that's Friday at 8am, do it. Or it might be Sunday nights. Whatever it is, try to show up every week even if it's not the same time or day.

Make sure you don't have any schedule conflicts with it. When I worked a corporate job, I did my reviews on Friday afternoon because it was rare to have any important meeting or call scheduled at that time. I've tried to keep that habit as a remote worker with a flexible schedule, but let's be honest that Friday afternoon is really the best time to take off a little early and enjoy the day. As a result I've had to adjust and change my norm so I can consistently do a review each week.

Monday's might be an okay time to do a review for you, but I'm generally not a fan of the beginning of the week. First you've passed the weekend, which means you've added another two days to try to remember what happened last week. It can be surprisingly difficult to recall as it is! Second, I think looking backwards on a Monday is counterproductive as it's the optimal time to look ahead to the upcoming week. That's my preference but if you like Monday for a review, stick with what works best!

Something else to consider for your review timing is habit chaining. There are many habits you can perform on a weekly basis, like cleaning your desk, reconciling your checkbook, or weeding the garden. If you're already performing a review weekly, why not chain another habit to it?

Habit chaining is just like it sounds – when you normally complete one habit, add another to complete right after. If you struggle to get out and weed the garden, chaining it to the weekly review could be a good way to encourage yourself to do it consistently.

The Foundational Components of the Review

The weekly review can be a highly flexible routine checklist that can shift and shape to your individual needs, and even the needs of the season you're in. There are a million different tasks you can focus on during the review, but in this guide we're going to focus on the foundational building blocks to get you started.

There are four main areas to focus on building into your weekly review.

1. **Clear the Decks** – neutralizing inboxes, capturing, and mindsweeping
2. **Process and Review Open Loops** – ensuring all projects & resources are up to date
3. **Reflect on the Past Week** – try to learn from what happened previously
4. **Prepare for the Next Week** – review and prepare for your upcoming commitments, intentions, and habits

We'll spend some time deep diving into each area.

1. Clear the Decks

The very first thing to do when starting your weekly review is clear out your mind, inboxes, and physical space. When you clear it all out, organize it in one place, and mentally prepare to process and review, the whole process gets easier.

Get Ready

Ages ago, I heard Merlin Mann talk about "doing it for two minutes".

This is the whole idea that your brain takes time to warm up and engage with the task on which you're working. So, when you're first starting, overcome the resistance to the task by simply doing it for two minutes. Once you get going, momentum kicks in and it'll be easier to continue going.

Clearing the decks starts with getting ready like this, but it's also important to keep the momentum. Protect the momentum, if you will. The last thing you want to be doing in a review of this sort is to get distracted. The review process is one of deep work, where you're focusing intently on one thing for a longer period of time. This allows your brain to understand all the contexts and connections between projects, tasks, commitments, intentions, and the like while you're working through the review. Staying focused will help you make better decisions about how to handle items in your system and what you're committing to for the next week.

When clearing the decks, get ready to dive in deep. Close out chat, set your phone to do not disturb, and go somewhere where you're not going to get interrupted. If you work at home, maybe go to a coffee shop. If you can't get out to a coffee shop, put on some noise cancelling headphones. The key is minimize as many distractions as you can.

I personally like to go to a coffee shop, put on my Bose QC35s, listen to some ambient music on repeat, and get going on my task list. If I have to stay at home, I have a separate desk where I'll set up my laptop, turn on the music, and start digging in.

Mindsweep

One of the quickest ways to get clear of the items causing you stress in your head is a mindsweep, also affectionately known as a brain dump. Getting these "open loops" out of your head and onto a piece of paper or text file puts them in a place where you can properly review and process them later.

Traditionally, most people see a mindsweep as capturing tasks, projects, ideas, and commitments that are stuck in your head. That's the normal definition of an open loop.

I like to take things a bit further by taking Chris Bailey's idea of scatterfocus from the book *Hyperfocus* and using that as a mindsweep. Essentially, I sit down, let my mind start to unwind, then write down anything that comes up. This can be a task, project, or other traditional open loop idea, but it can also be a fear, a dream I had last night, an emotion I'm feeling in the moment, or *literally anything else* that comes to mind. I'll do this for 10–15 minutes until nothing else is coming up.

What additional advantages does capturing all these ancillary, non-actionable items give you? Well, for one, it gives an outlet to write down and process the items that are on your mind, whether or not they are tasks. Sometimes we carry an emotional or mental weight with us that we don't realize because we've neglected taking time to process because we want to be "productive". In weeks where I've been truly busy with a schedule full to the brim, I've seen many a negative emotion come up where I realized it was causing me undue stress. The mere fact of writing it down often brings a release which helps me stay more focused and intentional going forward.

Additionally, these extra items can spawn action items you wouldn't necessarily think of offhand. For example, say you wrote down *I feel stressed about work today*. When you start processing that, you can ask yourself why you feel that way. Maybe you've been tasked with managing

a new team, and this ultimately results in an action item where you can chat with your boss about restructuring your responsibilities to better fit the new one added to your plate.

One thing to keep in mind when performing a mindsweep is try to avoid processing, organizing, or filing items you capture while you capture them. Let your mind unwind by freely writing out what you're thinking in the moment and evaluate it later.

There are many ways to perform a mindsweep, from writing in a text file to making an outline on paper Bullet Journal–style. However you approach it, I recommend avoiding doing this directly in your task manager's inbox. Not everything you will write down is a task, and limiting yourself to your task management inbox may subtly impose restrictions on your brain about what can/can't be added there, and may cause you to miss capturing other important items.

Process All Inboxes

Once you've completed the initial mindsweep, set that aside as we'll process it later. From there, go through each and every major inbox you have where "things to do" accumulate, and start capturing any relevant tasks that may be lingering there. You can write this on your mindsweep list or capture it into your task manager, whichever works best for you.

Common inboxes include email, chat, text messages, social media accounts, forums, task management inbox, and a note software inbox.

Do keep in mind that when you're clearing these inboxes you're not going to do any extensive work. *Getting Things Done* recommends to complete any task that takes two minutes or less. That's a fine recommendation, but more broadly put – try to touch an item only once. If you're not going to or cannot complete the task, then capture it for processing later.

When you're processing email or other conversation you need to respond to, there are a few tricks you can use to make this process easier and generating fewer tasks. Most recommendations would say to clip an email to your task manager if you need to do something with it. I'm not a fan of that approach because it often creates unnecessary noise. Instead, evaluate what action needs to take place, then capture that specific action or set of actions. In other words, don't capture "respond to email from Sam"; capture "research Arch Linux for Sam's newsletter". That's much clearer and more actionable.

Don't forget to use the strengths of the tools at hand, too. Again looking at email, if you have access to snooze or archiving features, use them! I'm a huge fan of the two folder system for email: inbox and archive. Anything in the inbox needs handling yet, and anything in the archive is done or is waiting for a response. This does two things:

1. It keeps my inbox free from emails that are not currently something I need to pay attention toward
2. Anything in the inbox then becomes something I need yet to handle.

With this clear but simple handling of email, I can more easily process my inbox and capture tasks at review time without having to slog through 17,000 newsletters that I may or may not have read at some point.

Oh and don't be afraid to judiciously delete.

2. Process and Review Open Loops

Here comes the section where I was tripped up for years as to what it meant: processing and reviewing.

When people talk about reviews, they say things like "I review my project list and calendar," but rarely do they ever get into what that looks like. Let's chat about that for a bit.

What Does Process Mean?

Processing means taking a thing you've captured, clarifying what it means, restarting the words if it's not clear enough, and placing it in the appropriate location in your system.

This will work best to show examples.

Example 1: a link to a video on cats

- Clarify: this is a link to a video about cats I captured this week because I wanted to watch it later.
- Restate: because that's not clear, I need to make this a task – "watch video about cats"
- File: Put this in the appropriate place in my task manager because I'm committed to watching it.

This was clearly an action item with one step (watch the video), so I made sure the task started with an action verb (watch) so that future me knows what to do with it more readily.

Example 2: fix the car battery

- Clarify: This is pretty clear as to the outcome to achieve but the path to get there is not. This is a project because it will take more than one action, so I need to define a next action for it.
- Restate: add a sub-task to "research causes of a dead battery"
- File: since this is now a project, I need to put it in the appropriate place such as the "Personal" folder in my task manager.

Example 3: car battery can die from a parasitic drain (with link to an article)

- Clarify: relating to our last example, this isn't 100% an action item, but it appears as though it contains some helpful information about fixing a car battery. Upon reviewing the article a clear action step emerges to help fix the battery.
- Restate: add the action item to the appropriate project for fixing the car, but make sure to save this resource to a reference system to review when trying to fix the car
- File: put article in appropriate file in reference system and task in correct project

Does that help clarify what processing does? The idea is to identify what a thing is (task, commitment, reference item, etc.), word it appropriately so you can either find or act on it later without thinking heavily about it, and put it in the right place for later reference.

What Does Review Mean?

There are three main questions to answer in reviewing any part of your system:

1. Is this up to date?
2. Do I need to do anything with this?
3. Is this in the right place?

Let's look at each.

Is this up to date?

Most often you are going to have parts of your system that are not reflecting your current reality. This can be canceled meetings, tasks needing to be checked off, tags to be added to current tasks, missing next actions on projects, etc.

With every thing you review in your system, the main goal is to ensure it is correctly representing what's going on now.

Do I need to do anything with this?

Two outcomes result from asking this question – new actions to take, and dropping actions/projects.

When reviewing your calendar, for example, look back on the last week and the upcoming 3–6 weeks. You're looking for anything you need to do now resulting from previous meetings or to prepare for upcoming ones. Capture those actions.

The review is also the hard spot where you need to ask yourself, "am I truly committed to getting that project done or attending that meeting?" It's not always easy to drop a project or cancel a meeting but not everything needs to be there. You only have a finite amount of time, attention, and energy, and it's your responsibility to make sure you use it well. Kill those projects that will never get done.

Is this in the right place?

The easy part of this question is to answer if a task, project, oror note is actually in the right place in your system. If not, move it!

Where this gets more complex is when something needs to change status. Sometimes tasks can become reference files, or projects need to go to a someday list. How do you choose what goes where?

I like to think of it this way:

If it's in my task manager, I'm committed to doing this within the next six months.

If I'm not committed to doing it in six months, it will go to my someday list, which I call a project incubator.

If all of a sudden I'm not going to do something, I'll either drop the project and delete the materials, or add all of it to an archive in my reference system somewhere, just in case.

With all of these items now defined, let's process and review.

Review a Trigger List

The first thing I like to do before doing *any* reviewing is go through a typical GTD-style trigger list. A trigger list is a group of items, both personal and professional, that's designed to surface anything that needs to be handled.

You can see a great example here: GTD Trigger List

Slowly read through the list and add any items that come to mind to your capture list for the review.

Process Captured Items/Mindsweep

From there, it's time to capture. It's okay if you don't think you have it all quite out yet; more open loops will likely surface as soon as you start moving through the review process, especially looking at your project lists.

Use the definitions we looked at above to help you process through your capture list to clarify, restate, and file the items on your list.

Keep in mind when filing that if you're not *for sure* committed to a task or project in the next six months it should live somewhere else, like a someday/maybe list. Storing projects and actions you're not committed to in your task manager is a sure-fire way to have an overwhelmed response to an untrusted system that you then you won't use until you clean it up.

Don't rush this part of the process, either. If you try to quickly file everything you can without thinking about each item critically (even for a moment), you'll only make work for yourself later.

Be diligent now because it will save you future frustration!

Review Projects List

Once you've processed your captured items, now it's time to dig into the deeper review. I like to start with my projects list.

When I review my projects list, I'll spend time looking over each project, and, using the review questions from before, make sure each project is as accurate as I can make it.

If you have projects that have no next actions but are not complete, make a next action, even if it's "Figure out the next steps on project x".

Sometimes this results in adding more tasks.

Sometimes I clarify the end goal.

Sometimes I realize I'm never going to realistically do this thing so I decide to drop it.

Make hard decisions. Clarify what's on your list as much as you can. Add or remove appropriate due dates, flags, defer dates, tags, or whatever other metadata your task manager allows and you decide is important to you. You'll feel better about it.

Review Calendar

This one's pretty simple, really. Look for any tasks relating to calendar appointments and create them.

When reviewing my calendar, I always look at the previous 1–2 weeks and upcoming 3–6 weeks, depending on what's going on in my life at that time.

Review Notes

Similar to calendar, it's a simple review of the notes you've taken from the last week, particularly meeting notes, where you're looking for any potential action items you may have missed.

Since I now work remotely and don't have many meetings, I don't actively have this in my checklist, but for most people this will be an important one.

If you don't take notes, even simple ones, it's important to start!

Review Any Special Views/Perspectives

If your task manager allows for custom views or perspectives, take a look at your most common ones you use. Ensure all the items on that list are accurate. If any are missing, add them, or, conversely, get rid of items that are no longer relevant.

Review Incubation/Someday List

This is probably the most *fun* part of a weekly review, in my opinion. I enjoy dreaming about the possibility of the future, and I always love a new project I'm passionate and engaged with.

Take a look at your someday/maybe list. Add any details for projects/ideas that come to mind. File any new ideas that came up during the review. But, now for the fun part, also review the list for any ideas that are now relevant and you're able to commit to doing.

If you have any new items, add those as projects to your task manager.

> 💡 **TIP**: *If you don't have a direct action plan for that project quite yet, be sure to create a next action to "Plan project regarding…"*

Review Journal

Not everyone keeps a journal, but if you do, now may be a good time to review your entries over the last week. Are there any entries that spark ideas or action items? Be sure to capture those.

Oh, and keep that journal handy because we're now onto the next section of the review.

3. Reflect on the Past Week

The meat and potatoes of the review is done. We've captured everything we can and have ensured our system is now up to date. That's great! Most people stop there. Over time, however, I've learned that simply reviewing my tools is not enough. I need to take time to think and reflect on how my week actually went.

Productivity is an iterative process. Every day you encounter new tasks, information, tools, and ideas. With such an ever-changing world around you, it would do you a great service to make sure everything is working as optimally as it could!

What I've found to be helpful in this is to write out answers to a few questions that help me reflect on the past week. I almost always find at least one area where I need to adjust my focus or place more/less priority on when I do this exercise.

Let's look at those questions in a moment, but first let's define a few important concepts.

I've heard many say that the essential components to a productivity system are a task manager, reference software, and calendar. While those are essential *tools*, they are not the core components of a system.

Those components are:

- **Commitments** – These are your hard landscape items where if you don't do them, something breaks. They can be appointments or set commitments with yourself, such as publishing a blog post every Friday.
- **Intentions** – Anything deemed important enough to focus on today/this week but isn't going to break the world if it's not done is an intention.
- **Habits** – Habits are recurring actions at set intervals that help you move the needle forward in areas of your life or assist in

maintaining something, such as your health.

Having these components in mind, let's look at the review questions.

Did I meet my commitments?

Did you miss any commitments? Were there too many on your plate? Not enough? This may give you a good sense if there are responsibilities to eliminate or if you have room to add any.

Did I accomplish my intentions?

Where commitments require follow-through, intentions can allow for some flexibility. If you missed any intentions, was that due to your own issues (like procrastination), external circumstances, or were you overloaded on commitments? Is there anything you can do to mitigate that in the future?

How did my habits go?

Review your habit tracker (you should have one if you are intent on having habits). Did you miss more than one day in a row? Do those habits line up with your broader aims in this season of life? Are there any triggers you need to change for habits, such as chaining them with a different action?

Did I focus on the Most Important Things?

Everyone has Most Important Things in their lives. Your most important things are different than mine. And no, we're not talking most important tasks. These are the highest level areas of investment. For me, that's my

spiritual life and relationship with my wife and kids. So, for me, this is asking if I loved my family well, if I spent time in prayer, or if I neglected any of those items.

If this is falling off the rails, I need to reframe everything else to get back on track because this is the priority always.

Is there anything I want to try next week?

We productivity enthusiasts are always looking for something new to try, right? A new cool app, perspective idea in OmniFocus, or a new note-taking style. Of course, you can't upend your system all at once for something that's not proven. However, you can give yourself a little wiggle room to experiment, especially if there's something not working for you now.

If you identify anything you'd like to change or try, experiment with it for a week, then report back here.

These journaling questions can really help give you clarity on how you're developing in your productivity journey over time. It's not just about the rote practice of journaling; it's about thoughtful engagement with the thought processes and mindsets behind your productivity system to make sure it is working for you the way it needs to. The more aware you are, the better decisions you can make moving forward.

4. Prepare for the Next Week

By this point in the review process, there's usually a level of clarity that comes about what's the most important to focus on for the next week. Of course, as with any plan, there's only so much you can do because the future is a great unknown.

What you can do, however, is prepare yourself for what you'd ideally like your week to look like. And, lucky you, the review process you just went through makes this a whole lot easier.

Review Goals

If you carry any sort of goals, aims, or theme, now would be a great time to review them. Be sure to ask yourself if there are any particular action items you need to accomplish in the next week to keep on track.

Ideally these would be in your task manager already, but if not, add them now.

Decide on Intentions for Next Week

J.D. Meier's book *Getting Results the Agile Way* shares a great concept that's stuck with me over a number of years now: the rule of three.

The idea is to pick three main focuses for the week you intend to accomplish. These can be tasks and projects, but they can also be simple reminders, such as "Enjoy your lunch Thursday because it's a busy day". The number three is ideal because it's easiest to manage and remember three things.

A great way to frame your week is to pick three intentions, including projects you want to advance, tasks to complete, or anything else that will help you have the best week you possibly can.

Set Up a Week Plan

From there, the only thing left is to set up the plan for your week.

I make my week plans in Notion (and I've made a video you can find on YouTube about that). Mainly, I note the following items down for each week. Having manually put a plan together helps me to keep the items for that week top of mind. When stuff is top of mind, I stay all the more intentional in advancing them.

In my week plan, I'm sure to include:

- **Focus** – This is my overarching main goal for the week, usually a particular project I want to advance.
- **Commitments** – Write out any known meetings, appointments, or due tasks.
- **Intentions** – List of the intentions previously selected
- **Habits** – Add a reminder for the habits you want to focus developing this week.

Of course, yours may vary, but feel free to use this as a starting point!

What If I Don't Have Time for a Full Review?

There will be times you do not have time to complete a full review. That's okay. That's life. Don't feel pressured.

If you have any time at all to complete one, focus on the following areas:

- Performing a mindsweep
- Processing inboxes and tasks
- Reviewing any major/due projects and commitments

The rest of the system can likely wait until you have time to conduct a full review. If you focus on these areas first, you'll have 80% of your bases covered for things that could bite you if you miss them.

That sums up the **Ultimate Guide to an Effective Weekly Review**. Thanks so much for reading!

TLDR;

- The weekly review is the glue of your productivity system
- Be consistent in conducting one
- Clear the decks by:
  - Getting ready,
  - Mindsweeping,
  - Processing all inboxes
- Process and review open loops by:
  - Reviewing a trigger list
  - Process captured items
  - Review your projects list, calendar, notes, someday/maybe,

and journal
- Reflect on the past week through journaling
- Plan for the next week by setting your main focus, commitments, intentions, and habits