

Making It All Work

Winning at the
Game of Work
and the
Business of Life

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INCOMPLETION TRIGGER LIST

What do you have attention on?

Professional

Projects started, not completed

Projects that need to be started

“**Look into**” projects

Commitments/promises to others

boss, partners, colleagues, subordinates, others in organization, other professionals, customers, other organizations

Communications to make/get

calls, e-mails, voice mails, faxes, letters, memos

Writing to finish/submit

reports, evaluations, reviews, proposals, articles, marketing material, instructions, summaries, minutes, rewrites and edits, status reporting, conversation and communication tracking

Meetings

upcoming, need to be set or requested, need to be de-briefed

Read/review

books, periodicals, articles

Financial

cash, budget, balance sheet, P&L, forecasting, credit line, payables, receivables, petty cash, banks, investors, asset management

Planning/organizing

goals, targets, objectives, business plans, marketing plans, financial plans, upcoming events, presentations, meetings, conferences, travel, vacation

Organization development

org chart, restructuring, lines of authority, job descriptions, facilities, new systems, change ini-

tiatives, leadership, succession planning, culture

Administration

legal issues, insurance, personnel, staffing, policies/procedures, training

Staff

hiring, firing, reviews, staff development, communication, morale, feedback, compensation

Systems

phones, computers, software, databases, office equipment, printers, faxes, filing, storage, furniture, fixtures, decorations, supplies, business cards, stationery, personal organizers

Sales

customers, prospects, leads, sales process, training, relationship building, reporting, relationship tracking, customer service

Marketing/promotion

campaigns, materials, public relations

Waiting for

information, delegated projects/tasks, pieces of projects, replies to communications, responses to proposals, answers to questions, submitted items for response/reimbursement, tickets, external actions needed to happen to continue or complete projects . . . (decisions, changes, implementations, etc.), things ordered

Professional development

training, seminars, things to learn, things to find out, skills to develop or practice, books to read, research, formal education (licensing, degrees), career research, resume

Wardrobe

professional

INCOMPLETION TRIGGER LIST

What do you have attention on?

Personal

Projects started, not completed

Projects that need to be started

Projects - other organizations

service, community, volunteer, spiritual organization

Commitments/promises to others

spouse, partner, children, parents, family, friends, professionals

Communications to make/get

calls, e-mails, faxes, cards, letters, thank-yous

Upcoming events

birthdays, anniversaries, weddings, graduations, outings, holidays, vacation, travel, dinners, parties, receptions, cultural events, sporting events

Family

projects/activities with spouse, partner, children, parents, relatives

Administration

home office supplies, equipment, phones, answering machines, computers, internet, TV, DVD, appliances, entertainment, filing, storage, tools

Leisure

books, music, videos, travel, places to visit, people to visit, web surfing, photography, sports equipment, hobbies, cooking, recreation

Financial

bills, banks, investments, loans, taxes, budget, insurance, mortgage, accountants

Legal

wills, trusts, estate, legal affairs

Waiting for

mail order, repairs, reimbursements, loaned items, information, rsvp's

Home/household

real estate, repairs, construction, remodeling, landlords, heating and A/C, plumbing, electricity, roofs, landscaping, driveways, garages, walls, floors, ceilings, decor, furniture, utilities, appliances, lights and wiring, kitchen stuff, laundry, places to purge, cleaning, organizing, storage areas

Health

support and maintenance, doctors, dentist, optometrist, specialists, checkups, diet, food, exercise

Personal development

classes, seminars, education, coaching, career, creative expressions

Transportation

autos, bikes, motorcycles, maintenance, repair, commuting, tickets, reservations

Clothes

professional, casual, formal, sports, accessories, luggage, repairs, tailoring

Pets

health, training, supplies

Errands

hardware store, pharmacy, department stores, bank, cleaners, stationers, malls, gifts, office supply, groceries

Community

neighborhood, neighbors, service work, schools, civic involvements

NATURAL PLANNING MODEL®

1. Purpose/Guiding Principles

- Why is this being done? What would “on purpose” really mean?
- What are the key standards to hold in making decisions and acting on this project? What rules do we play by?
- The purpose and principles are the guiding criteria for making decisions on the project.

2. Mission/Vision/Goal/Successful Outcome

- What would it be like if it were totally successful? How would I know?
- What would that success look or feel like for each of the parties with an interest?

3. Brainstorming

- What are all the things that occur to me about this? What is the current reality? What do I know? What do I not know? What ought I consider? What haven't I considered? etc. (see Project Planning Trigger List).
- Be complete, open, nonjudgmental, and resist critical analysis.
- View from all sides.

4. Organizing

- Identify components (subprojects), sequences, and/or priorities.
- What needs to happen to make the whole thing happen?
- Create outlines, bulleted lists, or organizing charts, as needed for review and control.

5. Next Actions

- Determine next actions on current independent components. (What should be done next, and who will do it?)
- If more planning is required, determine the next action to get that to happen.

Shift the level of focus on the project as follows if needed:
If your project needs more clarity, raise the level of your focus.
If your project needs more to be happening, lower the level of your focus.

How much planning is required?
If the project is off your mind, planning is sufficient.
If it's still on your mind, then more is needed.

PROJECT PLANNING TRIGGER LIST

Resources

Whose input do you need?
 Whose input could you use?
 Has anything like this been done before?
 What mistakes can you learn from?
 What successes can you learn from?
 What resources do you have?
 What resources might you need?

Executive issues

How does this relate to the strategic plan?
 How does it relate to other priorities, directions, goals?
 How will this affect your competitive position?

Administration

Who's accountable for this project's success?
 Lines of communication
 Methods of reporting
 What structures do you need?
 What planning is still likely to be required?
 What regrouping will you need? How often?
 What people do you need?
 Current staffing?
 Hiring?
 Subcontractors, consultants?
 How do you get involvement?
 What skills are required?
 Who needs to know how to do what?
 What training do you need?
 How do you get it?
 What other communication do you need?
 Who needs to be informed as you go along?
 What policies/procedures are affected?
 What about morale? Fun?

Finance

What will this cost?
 How do you get it?
 What might affect the cost?
 Might you need additional financing?

Public Relations

Is there value in others knowing about this?
 How do you do that?

Risks

What could happen?
 Could you handle it?

Creative thinking . . .

Who would have concern about the success of this project?

What are the potential payoffs (profit)?
 Who signs the checks?

Operations

What is the timing?
 Hard deadlines?
 What might affect timing?
 Who's going to do the work?
 How do you ensure complete delivery?

Quality

How will you monitor the progress?
 How will you know if the project is on course?
 What data do you need, when?
 What reports, to whom, when?

Politics

Whose buy-in do you need?
 How can you get it?

Stakeholders' Considerations

Board
 Stockholders
 Employees
 Vendors
 Customers
 Community

Legal

Issues?
 Regulations?

Space/Facilities/Equipment

What requires room?
 How do you get it?
 What tools do you need? When?
 Phones/computers

Research

What might you need to know?
 What would they say, ask, or input that you haven't done yet?
 What's the worst idea you can imagine about doing this project?
 (What is therefore the best idea, which is its opposite?)
 What is the most outrageous thing you can think of about this project?
 What would make this project unique?
 What haven't you asked yourself about this yet?

MASTERING WORK FLOW

1. Collect

- Capture anything and everything that has your attention in leakproof external “buckets” (your in-baskets, e-mail, notebooks, voice mail, etc.). Get them out of your short-term memory (use the Incompletion Trigger Lists to keep yourself “downloaded”).
- Have as few of these collectors as you can and as many as you need.
- Empty them regularly, by processing and organizing (see below).

2. Process

- Process the items you have collected (decide what each thing means, specifically).
- If it is not actionable, toss it, “tickle” it for possible later action, or file it as reference.
- If it is actionable, decide the very next physical action: do it (if less than two minutes); delegate it (and track it on a “waiting for” list), or defer it (put it on an action-reminder list or in an action folder). If one action will not close the loop, then identify the commitment as a project and put it on a reminder list of projects.

3. Organize

- Group the results of processing your input into appropriately retrievable and reviewable categories. The four key action categories are:

Projects (projects you have a commitment to finish)

Calendar (actions that must occur on a specific day or at a specific time)

Next Actions (actions to be done as soon as possible)

Waiting For (projects and actions others are supposed to be doing and which you care about)

- Add subcategories of these lists if it makes them easier to use (Calls, Errands, At Home, At Computer, etc.).
- Add lists of longer-horizon goals and values that influence you.
- Add checklists that may be useful as needed (job description, event-trigger lists, org charts, etc.).
- Maintain a general-reference filing system for information and materials that have no action but which may need to be retrieved.
- Maintain an “on-hold” system for triggers of possible actions at later dates (Someday/Maybe lists, calendar, tickler).
- Maintain support information files for projects as needed (can be kept in reference system or in pending area).

4. Review

- Review calendar and action lists daily (or whenever you could possibly do any of them).
- Conduct a customized weekly review to get clean, get current, and get creative (see Weekly Review).
- Review the longer-horizon lists of goals, values, and visions as often as required to keep your project list complete and current.

5. Do

- Make choices about your actions based on what you can do (context), how much time you have, how much energy you have, and then your priorities.
- Stay flexible by maintaining a “total life” action reminder system, always accessible for review, trusting your intuition in moment-to-moment decision-making.
- Choose to:
 - 1- do work you have previously defined or
 - 2- do ad hoc work as it appears or
 - 3- take time to define your work(You must sufficiently process and organize to trust your evaluation of the priority of the ad hoc.)
- Ensure the best intuitive choices by consistent regular focus on priorities. (“What is the value to me of doing X instead of doing Y?”) Revisit and recalibrate your commitments at appropriate intervals for the various levels of life and work (see Horizons of Focus):
- **Runway** - current actions (daily)
- **10,000 ft.** - current projects (weekly)
- **20,000 ft.** - current responsibilities (monthly)
- **30,000 ft.** - 1–2 year goals (quarterly)
- **40,000 ft.** - 3–5 year goals (annually)
- **50,000 ft.** - career, purpose, lifestyle (annually +)

THE WEEKLY REVIEW

Get Clear

Collect Loose Papers and Materials

Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-basket.

Get “IN” to zero

Process completely all outstanding paper materials, journal and meeting notes, voice mails, dictation, and e-mails.

Empty Your Head

Put in writing and process any uncaptured new projects, action items, waiting-fors, someday/maybes, etc.

Get Current

Review Action Lists

Mark off completed actions. Review for reminders of further action steps to record.

Review Previous Calendar Data

Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

Review Upcoming Calendar

Review upcoming calendar events (long- and short-term). Capture actions triggered.

Review Waiting-For List

Record appropriate actions for any needed follow-up. Check off received ones.

Review Project (and Larger Outcome) Lists

Evaluate status of projects, goals, and outcomes one by one, ensuring at least one current action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting-fors, etc.

Review Any Relevant Checklists

Use as a trigger for any new actions.

Get Creative

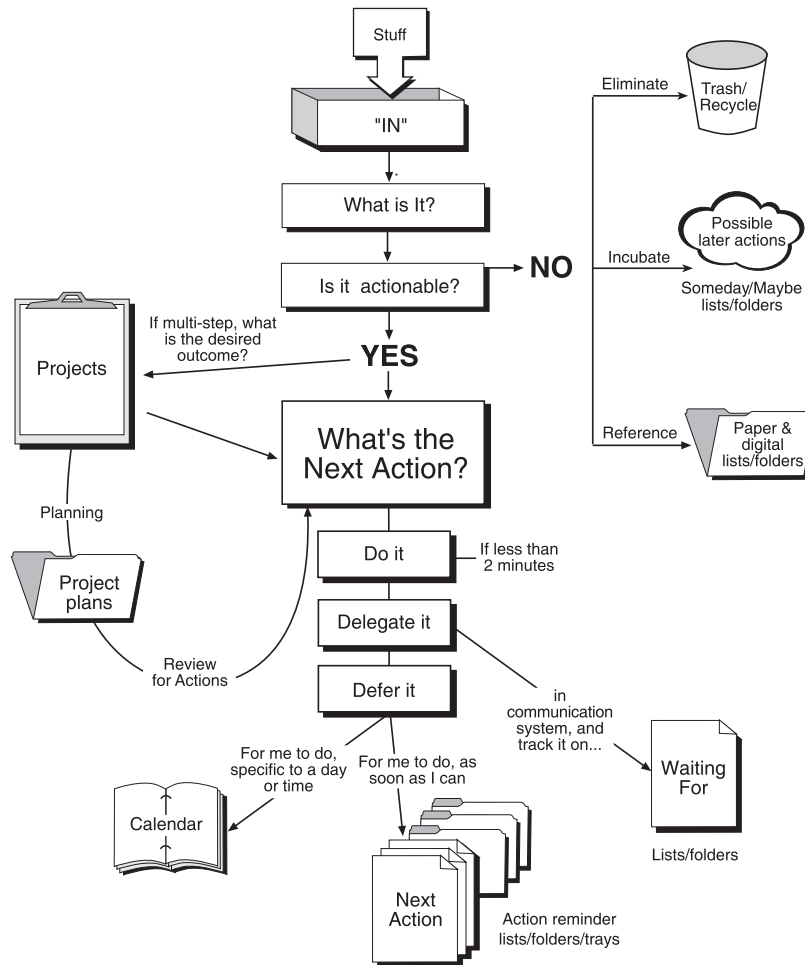
Review Someday/Maybe List

Review for any projects which may now have become active and transfer to “Projects.” Delete items no longer of interest.

Be Creative and Courageous

Any new, wonderful, harebrained, creative, thought-provoking, risk-taking ideas to add into your system?

WORK FLOW PROCESSING & ORGANIZING



HORIZONS OF FOCUS

The Altitude Map

“Work” is defined and managed from at least six different horizons, corresponding to different altitudes of perspective. These range from core intention—the understanding of the purpose and values of an undertaking, enterprise, or life—to the most mundane—the next physical actions required to move them forward. Clarity is enhanced and distraction reduced when the multiple levels with which you are engaged have been assessed and the commitments emerging from each one have been appropriately identified, captured, and implemented. Alignment of the various levels produces maximum productivity.

Priorities are determined from the top down—i.e., your purpose and values will drive your vision of the purpose being fulfilled, which will create goals and objectives, which will frame areas of focus and responsibility. All of those will generate projects, which will require actions to get them done. Each horizon is equally important to clarify, however, to get things done, and the content of your thinking and commitments will be different on each level. A key driver for your life may be to assist others in achieving their dreams (purpose), which you will express by becoming a world-class athlete and spokesperson (vision), for which you will achieve a starting line-up position on a national team (goal). To do all this you need to maintain a rigorous training program (area of focus). You realize you want to get a new personal trainer (project), for which you need to call your college coach (next action) to get his recommendation.

An altitude map can be used to identify which conversation, at what horizon, with yourself and others, might have the most value, at any point in time. It could be at any level or include a combination of them. You may know the long-term goal but have yet to identify the projects needed. You may know the vision but not the actions and who's doing them. Et cetera. Keeping your thinking current at all horizons is a dynamic process. As your world and your awareness of it change, so must these arenas of your focus be continually updated.

Following is a general list of the levels of focus, with typical formats and suggested frequencies of visitation. (Samples given from a hypothetical business - Gracie's Gardens)

50,000 ft. - Purpose and core values. Ultimate intention for something and the standards for its success. Why are we doing this? What are the critical behaviors?

Formats: Off-sites with partners, board, team, family; initial discussions for launching projects, meetings, whole enterprises; life planning

Frequency: Whenever additional clarity, direction, alignment, and motivation are needed

(Gracie's Gardens: "Provide the highest-quality landscape and garden materials to delighted retail and wholesale customers"; "Strong and lasting customer relations; environmentally friendly products; well-supported staff"; etc.)

40,000 ft. – Vision. What it will look, sound, feel like with successful implementation. Long-term outcomes and ideal scenarios.

Formats: Off-sites with partners, board, team, family; initial discussions for launching projects, meetings, whole enterprises; life planning; annual revisiting of enterprise direction; ideal scene development; personal treasure maps

Frequency: Whenever additional clarity, direction, alignment, and motivation are needed

(Gracie's Gardens: "Recognized as the #1 garden and landscaping store in the tricounty district; a fun, interesting, creative, informative place to browse and shop, attracting discriminating clientele who love to spend time and money on an on-going basis;" etc.)

30,000 ft. – Goals and objectives. What do we want and need to accomplish, specifically, within the next 12–24 months, to make the vision happen?

Formats: Off-sites with partners, board, team, family; strategic planning; annual goal-setting and broad planning sessions; life and family planning

Frequency: Annually; quarterly reviews and recalibrations

(Gracie's Gardens: "By year-end, 15% sales growth, 20% profitability, wholesale business established and in the black," etc.)

20,000 ft. — Areas of focus and responsibility. Important spheres of work and life to be maintained at standards to "keep the engines running."

Formats: Job descriptions; organization charts; employee manuals; personal lifestyle checklists; family responsibility designations; project checklists

Frequency: Performance reviews; monthly personal check-in's; whenever job or life changes require reassessment of responsibilities

(Gracie's Gardens: "Executive, administration, PR/marketing, sales, finance, wholesale operations, retail operations," etc.)

10,000 ft. – Projects. Outcomes we want to achieve that require more than one action and which can be completed within a year.

Formats: Overview list of all projects; project plans (defined subprojects)

Frequency: Weekly review; whenever next-action contents are not current

(Gracie's Gardens: "Set up wholesale division, get the books current, hire director of marketing, finalize Acme contract, upgrade HVAC system," etc.)

Runway – Actions. Next physical, visible actions to take on any project or other outcome; any single action to take about anything

Formats: Calendar, action lists (e.g. calls, errands, at home, at office, talk to boss about . . .); action folders or bins (e.g. read/review, bills to pay)

Frequency: Multiple times daily; whenever a question about what to do next

(Gracie's Gardens: "Draft plan for wholesale division, e-mail Sandy re: bookkeeper recommendations, call Brandon re: lunch meeting, review Acme purchasing history, surf web for competition ads" etc.)

GTD-Q—What is Yours?

Take the free GTD-Q assessment and discover where *you* are right now on the **control** and **perspective** matrix!

Visit www.gtdiq.com and in less than five minutes you can get valuable feedback and specific recommendations, tailored to your assessment score, for the best techniques to move you further into “Captain and Commander” mode.

You can take this assessment anytime, at no cost, and as often as you like. Notice what changes and what remains consistent in your scores over time. The **GTD-Q** tool and its related support and educational materials is a success builder that will continue to assist you at the game of work and the business of life. If you have interest in implementing any of the powerful ideas and practical techniques in *Making It All Work*, **GTDIQ.COM** is a great place to start!

Go to **GTDIQ.com** and follow the simple instructions for your free GTD-Q assessment. Your results will be available immediately.