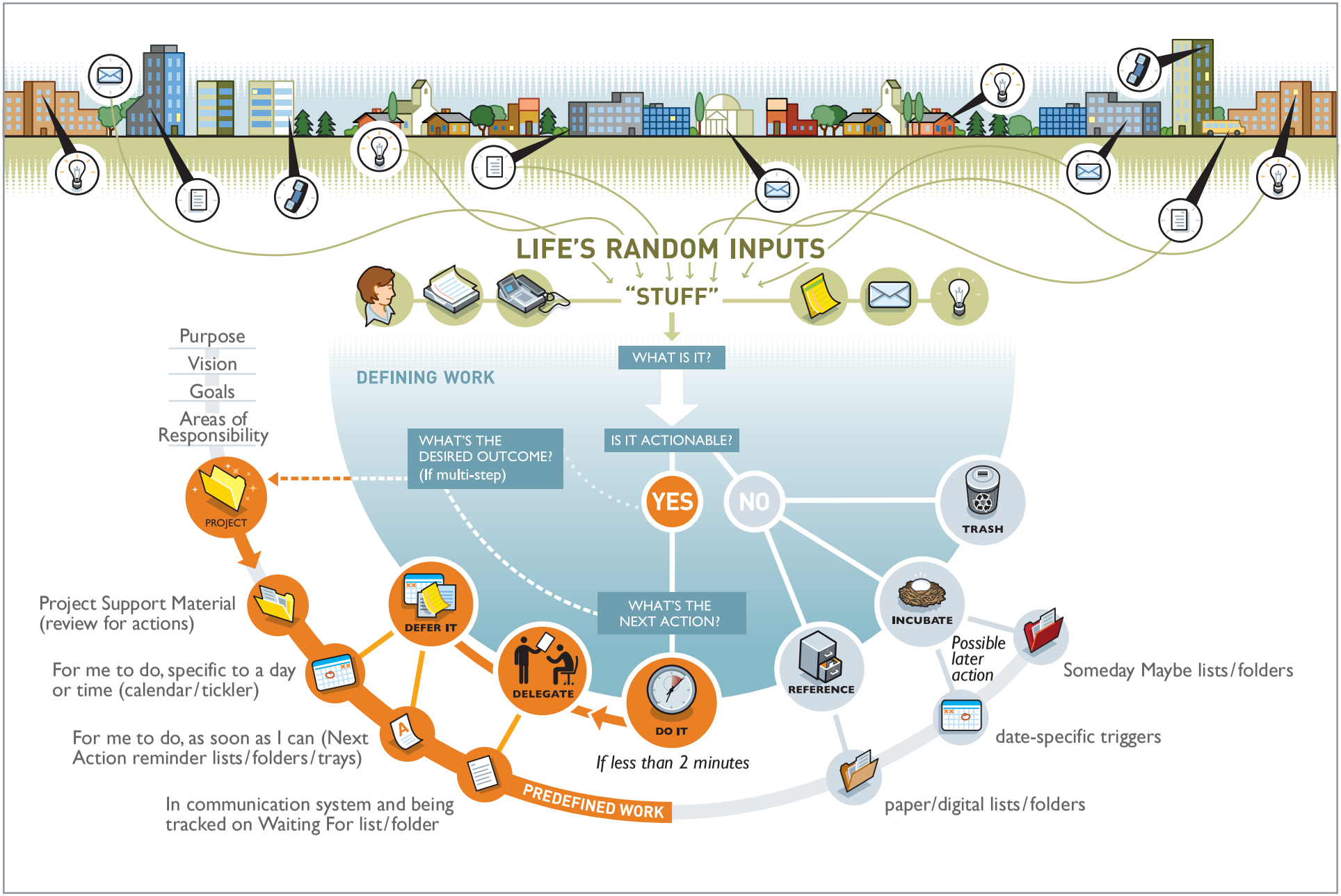
Workflow Processing and Organizing



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Mastering Workflow - The Five Phases

1. Collect

- Capture anything and everything that has your attention in leakproof external "buckets" (your in-trays, email, notebooks, voicemail 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 (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, which you do (if less than two minutes), delegate (and track on "waiting for" list), or defer (put 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 time)
  Next Actions - (actions to be done as soon as possible)
  Waiting For - (projects and actions others are supposed to be doing, which you care about)

- Add sub-categories 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 need to be retrievable.
- 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 Next 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.

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Mastering Workflow - The Five Phases

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5. Do

- Make choices about your actions based upon 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 level** - current projects (weekly)
  - **20,000 level** - current responsibilities (monthly)
  - **30,000 level** - 1-2 year goals (quarterly)
  - **40,000 level** - 3-5 year goals (annually)
  - **50,000 level** - career, purpose, lifestyle (annually +)

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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. Etcetera. 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 generalized 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 level - 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 level – 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 tri-county 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.)

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Horizons of Focus

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30,000 level – 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 level – 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 level – 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 sub-projects)

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.)*

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