

3. Empty the buckets regularly
2. **Process**
 1. What is it?
 2. Is it Actionable? YES or NO
 - **No**
 1. Trash
 2. Incubate
 - someday/maybe list
 - tickler file
 - 3. Reference file
 - **Yes**
 1. What is the next action?
 - **Do it**
 - **Delegate it**
 - **Defer it**
 - Project (anything involving more than one step to complete.
 2. Actionable item tracking
 - list of projects
 - storage or files for projects
 - calendar (time specific actions [appointments] or information)
 - list of reminders of next actions

- a list of reminders of things you're waiting for – periodic reviews
3. **Organize** the results
 - **Next Action:** determine the very next thing you need to move forward.
 - **Projects:** for goals that take more than one action step.
 - **Waiting:** actions that can't be done yet.
 - **Someday/Maybe:** list for ideas or long term goals you're not working on yet.
 - **Context-sensitive lists:** examples: @PhoneCalls, @Computer, @Errands, @Home.
 - **Calendar:** for time specific items only.
 - **Filing:** File as you go for best results.
 - **Tickler:** reminder system for future items.
 4. **Review** the options
 5. **Do**
 - choose next actions according to:
 1. context
 2. time available
 3. energy available
 4. priority

Weekly Review

1. **Loose Papers** - put in in-basket for processing
2. **Process Your Notes**
3. **Previous Calendar Data**
 - review for remaining items
4. **Upcoming Calendar**
5. **Empty Your Head**
 - write down all new projects, action items, etc.
6. **Review "Projects"**
 - ensure that at least one start-up action is in your system for each
7. **Review "Next Actions" Lists**
 - Mark off completed actions & review for further action steps
8. **Review "Waiting For" List**
 - Check off received items & document needed actions for any follow-up items
9. **Review Checklists**
10. **Review "Someday/Maybe" List**
 - Check for any projects that are now active and move them to "Projects." Delete items no longer of interest
11. **Review "Pending" and Support Files**

- Browse through all work-in-progress support material to trigger new actions, completions, and waiting-fors

Making Action Choices – 3 Types of Work

1. predefined work
2. work as it shows up
3. defining work

Six Level Model for Reviewing Your Own Work

1. current actions
2. current projects
3. areas of responsibility
4. 1-2 year goals
5. 3-5 year vision
6. big picture view

Five Phases of Natural Planning Techniques

1. **Purpose / Guiding Principles** (Why are we doing this?)
2. **Mission / Vision / Goals / Successful Outcome** (What would wild success look, sound, or feel like?)
3. **Brainstorming** (How would we accomplish it?)

Daily Guide to Getting Things Done by David Allen

1. **Capture** every thing you need to get done into a system outside of your head.
2. Discipline yourself to **make decisions about all inputs** into your life, making next actions plans to implement or modify over time.

Outcomes & Actions

1. Describe the intended successful outcome for the problem or situation in a single sentence.
2. Document the next action required to move things forward.

Five Stages of Workflow

1. **Collect** things that command attention
 1. Get it all out of your head
 2. Put into collection buckets
 - physical in-basket
 - writing paper and pads
 - electronic note taking
 - auditory capture (answering machines, voicemail, dictating equipment)
 - email

Sources: <http://www.minezone.org/wiki/Vance/GettingThingsDone>

When I could possibly move on this, I want to see the action as an option => **set next action reminder**

- I need reminder of this short-term goal I've committed to => **project list item, reviewed weekly**
- I need this when I focus on a project => **support material to store or file**
- I might want to do this in the future => **Someday/maybe list item**
- I might want to work on this in the future (after specific date) => **calendarred or "tickled" item incubated for review on a specific future date**
- I want to achieve this larger goal => **goals, objectives, visions that you review on some longer interval**
- It's something someone else is doing that I care about => **item on Waiting-For list, reviewed at least weekly**
- I need to consider it when I do certain recurring activities => **item on a checklist**

SUMMARY

1. Get everything out of your head.
2. Decide actions and outcomes when things first emerge on your radar, instead of later.
3. Periodically review and update open loops of your life and work.

Processing:

- I don't need or want it => **trash**
- I still need to decide on this => **IN basket item reference file**
- I might need this information => **reference file**
- I use it => **equipment and supplies**
- I like to see it => **decoration**

1. View the project from beyond the completion date
2. Envision wild success (suspend "Yeah, but . . .")
3. Capture features, aspects, and qualities you imagine in place
4. Organizing (identify components, subcomponents, sequences, events, and/or priorities; what must occur and in what order? When do we do these things?)
5. Next Actions (Where do we start?)

"If the project is off your mind, your planning is sufficient. If it's still on your mind, keep applying the model until it's clear."

• Filing should be instantaneous and easy

- **One Alpha System**
 - consider A-Z-organizing unless you need more specific filing
 - organize by topic, project, person, or company
- Specialized filing may be necessary if amount of reference material on one topic or project exceeds one file drawer.