The Zen Of Productivity

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The *Excelerated* Life

"Move forward. Use your Excelerator!"

You already have more to do than you can possibly get done. The keys to productivity are to have a method of keeping track of all you have to do, and then having a way to choose the task or activity that is the best use of your time in this moment. This is the zen of productivity.

In his book, *Getting Things Done*, productivity guru David Allen introduces a concept from Karate -- "mind like water". "Mind like water" defines the perfect readiness state. Imagine throwing a pebble into the water. The water ripples and then returns to calm. Throw a larger rock, the water responds with larger ripples but eventually returns to calm. In each case, the water responds to the stimuli exactly as required, then moves back to its calm state. The water never overreacts or underreacts. [Allen 10 – 11] That is the result you want from a good event management / productivity tool. You want a way to track all of your tasks, projects, and interests - so nothing falls through the cracks and you may know at a glance everything you can do in this moment. Once you know what your choices are, then you need a way to prioritize and choose the appropriate task or activity.

Providing this level of control requires several tools. You need a way to capture everything that comes into your life that must be dealt with. You need to decide what to do with each of the activities, projects, tasks, etc. that you capture. You must organize all of the results of your decisions. You have to periodically review to keep everything up-to-date. And, of course, you must do all the things that come up as a result of your capturing, deciding, and organizing exercises.

In the next chapters, I'll present each of these steps in detail. But here is a brief look at each, so you can get started on the path to stress-free productivity.

Capture everything that comes into your life. At this point, "everything" means every thing. Well, obviously, not junk mail, trash, and so forth. But you need to have a way to collect all the other things that come up that you want to do, plus all your maintenance activities. Think of your in box at work or at home, or your e-mail inbox. You also need to collect all those sticky notes, scraps of paper, backs of envelopes, paper napkins, anything where you jot down something you wanted to remember.

Decide what to do with each item that you have collected. One of the key principles of this model is Deciding. Whether it be a physical item or a mental "to do", deciding what to do with it is key. Usually, deciding what to do is at least 1/2 the battle of getting it done.

Once you have captured all your "to dos" and decided what you are going to do with them, you'll want a way to organize both the tasks or activities and the materials that go with them. Here are the things you'll need to keep track of everything. A calendar, to record time-bound activities, such as appointments, meetings, and deadlines. A list of your next actions. A list of things you are waiting for, such as tasks you've delegated, phone calls, e-mails or other information you need from someone else. A list of your projects, plus storage for project plans and materials. Storage for reference materials. A "someday / maybe" list of things you may want to do in the future.

It's one thing to write down that you need batteries for the camera or to list that special book you want to read. It's another to remember that you need the batteries when you're at the store or to remember the book when you're at the library. Periodic reviews keep you current and help you to keep your hands around everything. This is how you know what must be done and when. Reviews allow you to keep the big picture in mind.

Of course, capturing, deciding, organizing and reviewing are important, but they don't mean much if you don't actually do the things you want to do. But if you've done the preliminaries, then it's a matter of determining context (what can you do where you are right now?), how much time you have available, how much energy you have available, and the priority of a given task. You may be in the mode of doing work as it comes up, of defining future work, or of completing pre-defined work. By following the model, you can be reasonably sure that the important things are getting done, and that you are making good choices of what to do and when.

In the remaining chapters, we'll look at each of these steps in depth: capture, decide, organize, review, and do. This provides a good model for stressless productivity and helps you retain the "mind like water" state of appropriate response to everything that comes your way.

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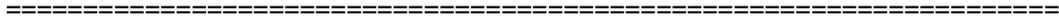
"Blessed are the flexible, for they shall not be bent out of shape." ~ Source Unknown

Create Your Life.

The keys to productivity are to have a method of keeping track of all you have to do, and then having a way to choose the task or activity that is the best use of your time in this moment. There are 5 distinct steps to achieve this level of mindful productivity. Our difficulties often stem from skipping a step or trying to combine steps. In this chapter, we look at the first step -- Capture everything.

To reach the state of mindful productivity, you want a way to track all of your tasks, projects, and interests - so nothing falls through the cracks and you know at a glance everything you can do in this moment. Once you know what your choices are, then you need a way to prioritize and choose the appropriate task or activity.

Providing this level of control requires several tools. You need a way to capture everything that comes into your life that must be dealt with. You need to decide what to do with each of the activities, projects, tasks, etc. that you capture. You must organize all of the results of your decisions. You have to periodically review to keep everything up-to-date. And, of course, you must do all the things that come up as a result of your capturing, deciding, and organizing exercises. You must approach each of these as its own discrete step . . . you can't skip steps and you can't try to do more than one, if you want the full benefits of this model.

The first step is to capture everything that comes into your life. At this point, "everything" means every thing. Well, obviously, not junk mail, trash, and so forth. But you need to have a way to collect all the other things that come up that you want to do, plus all your maintenance activities. Think of your in box at work or at home, or your e-mail inbox. You also need to collect all those sticky notes, scraps of paper, backs of envelopes, paper napkins, anything where you jot down something you wanted to remember.

Understand that "capturing" an item is not deciding where to put it or what to do with it . . . that comes in later steps. For now, you just want to be sure you're collecting everything that comes in that you must deal with. Here are the rules:

- Every open item must come out of your head and into your collection system.
- Have as many collection receptacles as you need and as few as you can get by with.
- Empty them regularly.

If you try to keep some stuff in your head and some in your collection system, you won't trust either one. You run the risk of forgetting something important. For your system to be reliable and trustworthy, you must capture everything.

Have the receptacles that you need to make it possible to get everything out of your head. But have only as many as you need. Your receptacles might include a physical inbox, an e-mail inbox, a voice recorder for recording ideas, information, etc. when you can't write them down, paper and pen for making lists and notes, an electronic note taking device, such as a Blackberry, personal digital assistant (PDA), or a program on your computer. Don't make things unnecessarily complicated by using tools you aren't comfortable with or that are difficult for you to use.

Empty every receptacle regularly. If you let things pile up in your collection baskets, your brain will start taking some of the stuff back, and your system becomes untrustworthy. (See above.) Once you pick something up out of your inbox (figuratively or literally), don't put it back or stick it on the bottom of the pile. Only begin the Deciding step when you have the time to complete it.

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You don't have to process everything at once. Emptying your collection baskets doesn't mean you have to finish everything that's in there. That is for the next steps.

If you are ready to try this stressless productivity model, begin this week to decide what your collection system looks like - what kinds of collection baskets do you need. Remember, have as many as you need but as few as you can get by with to be sure everything gets captured.

Next . . . Deciding what to do with all the stuff you've collected.

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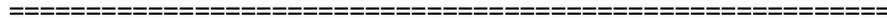
"The sense of anxiety and guilt doesn't come from having too much to do, it's the automatic result of breaking agreements with yourself." ~ David Allen

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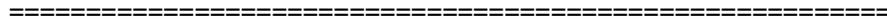
- ✓ Getting all your open items out of your head and onto paper frequently opens up a rush of creativity. Watch for it!

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To reach the state of mindful productivity, you want a way to track all of your tasks, projects, and interests - so nothing falls through the cracks and you know at a glance everything you can do in this moment. Once you know what your choices are, then you need a way to prioritize and choose the appropriate task or activity.

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The second step is to decide what to do with each item that you have collected. One of the key principles of this model is Deciding. Whether it be a physical item or a mental "to do", deciding what to do with it is key. Usually, deciding what to do is at least 1/2 the battle of getting it done.

OK, you've set up your collection system ("as many as you need, but not more than you need") and you are collecting all your "stuff" - everything that comes into your purview. Now, you're ready to begin emptying your receptacles. Here are the guidelines.

Should you use First In, First Out (FIFO) or Last In, First Out (LIFO)? It may seem to make more sense to start at the bottom of the pile and work on the things that have been there longest. But if you go through the entire stack within a short time, it won't matter because you will see everything. And it often saves time to read the most recent in a string of e-mails because of the string of replies -- you get to the current state of the matter more quickly.

Remove one item at a time from your in-box or other receptacle. Resist the temptation to pull out a handful of things at once and resist the urge to thumb through the stack to find the easy or fun things. This takes discipline. And never, ever pull an item off the top, look at it, then put it back in the pile. This is where the rule of "handle an item only once" comes from. It isn't practical nor efficient to always take everything to completion, so you may be handling an item several times. But each time, you are taking an action that brings you closer to completing the item. You may find times when you need to do a quick scan of e-mails, just to be sure nothing is about to blow up in your face. For example, you've been in a meeting all morning and you have 10 minutes before a scheduled 2-hour conference call, so you do a quick e-mail scan. But this isn't deciding. It's doing a quick scan to be sure nothing is about to blow up in your face.

Deciding consists of asking, then answering, three questions: (1) What is it? (2) Do I need to act on it? (3) What's the next action?

1. What is it? It's obvious that some things are items we need to do. But a lot of stuff gets put back on the bottom of the pile because we don't take a few seconds to decide if it's something we even need to deal with. If you don't, get rid of it.

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2. Do I need to act on it? The answer to this question is either "yes" or "no". If it's Yes, continue with step 3. If it's No, then do one of three things:

- If it's no longer needed, throw it away.
- If it's useful information that you may need later, file it as reference.
- If there is no action needed now, but there may be at a later date, store it in a "Someday / Maybe" file or folder.

3. What's the next action? This is the one step that can give the biggest productivity boost to most people. Many things don't get done because we don't decide what the next action is. An action is a discrete, physical step toward a desired outcome.

Here are some specific next actions for your consideration. If you're stuck on a particular task, use these suggestions to help you determine what your next action is. That step may be the one to move you to achievement.

* Research a problem, a question, or an area where you need more information.
* Call someone (your boss, a friend or adviser, your mother, etc.).
* Ask for help.
* E-mail someone.
* Brainstorm ideas or solutions.
* Write (a list, a report, a letter, an article, a book, etc.).
* Read a magazine article, a book, a report.
* Draft a proposal, a procedure, a policy (or something that doesn't begin with the letter "p").
* Buy (or otherwise procure) material or tools or other items you need to begin or complete a task or project.
* Register for a class or other training.

If the next action is something you can do in 2 - 5 minutes, do it now. (It will take longer than that to add it and track it in your organizing system.) If it will take longer, note the next action and put it in a "pending" folder. These will go into your organizing system . . . the next step in the model.

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"The most difficult thing is the decision to act, the rest is merely tenacity. The fears are paper tigers. You can do anything you decide to do. You can act to change and control your life; and the procedure , the process is its own reward." ~ Amelia Earhart

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✓ If you can't decide what to do, what can you do in order to decide? That's your next action.

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To reach the state of mindful productivity, you want a way to track all of your tasks, projects, and interests - so nothing falls through the cracks and you know at a glance everything you can do in this moment. Once you know what your choices are, then you need a way to prioritize and choose the appropriate task or activity.

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By now you are capturing all your "to dos" and are deciding what you are going to do with them. In this step, you'll set up ways to organize your tasks or activities and the materials that go with them, so you can know at a glance everything you want to do and when it should be done.

You need some way to physically corral all your information. This could be lists on paper, in a personal planner, such as the Franklin planner or Day Timer or the PocketMod I mentioned earlier. It could be electronic lists, such as on a PDA, PC or netbook. It could be individual file folders. Or it could be some other method you devise on your own.

To keep everything completely organized, you'll use: a project list and project files, next actions list, a calendar, a list of things you are waiting for (such as tasks you've delegated, phone calls, e-mails or other information you need from someone else), reference files or storage, a "someday / maybe" list, a trash can.

During the deciding phase, you determine if an item is actionable or not. If you decide an item is actionable, you also decide what the next action step is. Now, what do you do with it?

If you can do it in 2 - 5 minutes, do it now. It is quicker to do it than to try to keep track of it. But if it will take longer, or it must be done in a specific location, move it into your organizing system. If a task cannot be performed with one action, then it becomes a "project". A project is any task that requires two or more steps. Obviously, some projects require many steps and a great deal of advanced planning. But even it it's a small 2-step project, you need to keep track so you get both steps done in their proper order. If you try to keep track of it in your head, you bypass the system and your brain starts taking stuff back - your system becomes untrustworthy.

For tracking projects, keep a Projects List. For each project, set up a Project File. These hold your next actions plus all reference material related to the project. You don't "do" projects. You can only do the action steps related to the project. Once you complete all the actions, the project is "done". The next "next action" for your project goes on your actions list.

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Next actions are discrete tasks that you perform. Keep track of these on your Next Actions list. This is your Master List. Some actions may need to be done on a specific day and time (such as appointments or meetings.) These naturally go on your Calendar in the appropriate time slot. Other actions may need to be done on a specific day but at no particular time. These, too, go on the calendar but not for any specific time. Most planners allow you to track both time specific and non-time specific events. Use one calendar for everything. If you have separate calendars for work and home and family events, you'll be faced with trying to keep all of them synchronized -- and you won't. "The man who has two watches never knows what time it is."

If you have a small number of next actions (say 20 - 30), it may be simple just to keep them all on one list. You can see at a glance everything you have to accomplish. If you have a larger number, it may be easier to have sub-headings (or even sub-action lists), such as "At Work", "At Home", "At Computer", "Phone Calls". Use headings that make sense for you and the tasks you are tracking.

If an item isn't actionable, you can do one of three things: trash it, store it as reference, store it to be re-considered at a later time.

If it's obviously trash, or something you no longer need (old catalogs and magazines, out-dated memos and reference material, etc.), toss it.

If it's material you will need later as reference, set up a file and store it. (If it isn't worth the time it takes to file, it probably isn't worth keeping.) Project reference materials, of course, go in the appropriate project files. If it is time-sensitive material, i.e., you'll need it on a specific day, note it in your calendar. Keep all the reference material you need - the only limit is the physical space you have to store the files. And, be sure you have a filing system that allows you to retrieve the material when you need it again. Weed your reference files from time to time and discard anything that is outdated. Keep all the reference materials you want and need, but remember there is a maintenance cost.

What if it's something you *may* want to do at a later date, but you're not sure yet? Put it on a Someday / Maybe list or in a Someday / Maybe file. This allows your brain to let it go, knowing that you'll revisit the issue at a later time. BUT . . . your brain must be convinced that you *will* revisit the issue. This is why the periodic Review -- the next step in the productivity model -- is important.

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"I finally got it all together, but I forgot where I put it!" ~ Source unknown

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✓ "Everything should be made as simple as possible, but not simpler." (Albert Einstein)

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OK, so now you are capturing all your "to dos" and deciding what you are going to do with them. You have set up ways to organize your tasks or activities and the materials that go with them, so you can know at a glance everything you want to do and when it should be done. In this step, you'll learn the importance of reviewing your system periodically so that you know it is current, clean, and complete.

One of the keys to this productivity system is to get -- and keep -- all your tasks, projects, and commitments out of your head and recorded either electronically or on paper. This frees your brain up to decide in the moment what is the best use of your time. It also reduces stress and can enhance your creative thinking. But for all this to work, your brain must trust that it can let go of all your stuff. Periodic reviews keep you in control and keep your brain from trying to take stuff back.

Here are the guidelines for what to look at and when.

Calendar: Review this daily to get a clear picture of the day's scheduled activities. If you use a tickler file, review today's file at the same time. Knowing what must be done (appointments, meetings, etc.) today allows you to plan what else can be done in your discretionary moments.

Action Lists: Once you have your daily schedule in mind, review your action lists for other tasks and activities you *could* do within the context of where you are. For example, if you're at your computer, review your actions for when you are on the computer. If you have a few minutes to make phone calls, review your list of calls. Note that you may not actually *do* anything right now . . . you're just evaluating all the things you could do in addition to any new work coming in. This review helps you ensure that you're not missing anything critical.

The Weekly Review: One of the keys to the power and usefulness of this productivity model is the Weekly Review. This is your opportunity to process any new items that have accumulated in the last few days and look at all of your commitments, your projects, and even your "someday / maybes". Doing this once a week keeps you current, clean, and complete. Here's what to do:

o Collect everything from your various in-boxes that you haven't processed. This includes any notes you've scribbled in your calendar, on a notepad, on a napkin, sticky note, etc.

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o Empty your head. Write down any action items, things you are waiting for, project information, etc., that you are carrying in your head. I like to write one individual thought or item on a sheet of paper for ease of processing. You can do that or work from a list, which ever is more intuitive for you.

o Review your calendar for the past week to see if there are any actions, reference material, etc. that need to be brought into your system.

o Preview your upcoming calendar events (short- and long-term) to see if there are any actions or preparations that need to be added to your actions list.

o Review your projects to be sure you have at least one action item scheduled for each project.

o Review your Waiting For list and any other checklists. Add any follow up actions needed to your actions list. Delete anything that has been completed.

o Review your Next Actions lists. Make note of any follow up actions you need to add to your list. Delete anything that has been completed.

o Review your Someday / Maybe list. Is there anything whose time has come? If so, add it to your Projects list. Delete anything that is no longer of interest.

o Process the materials you have collected. Add them to your system as action items, projects, reference materials, calendar events, or the "Someday / Maybe" file, as appropriate.

This may seem cumbersome at first and you'll probably have trouble tearing yourself away from your work to do it. Persist. Once you begin to see the benefits, once you feel the sense of control and experience the enhanced productivity this brings, it will get easier to do. Then, it becomes a habit and you'll want to review to keep your system performing smoothly.

Once you've done the collecting, processing, and organizing, how do you decide what to actually *do*? We'll discuss that in the next chapter.

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"Thinking is the very essence of, and the most difficult thing to do, in business and in life . . . If you're not consciously aware of putting forht the effort to exert self-guided integreted thinking . . . then you're giving in to laziness and no longer in control of your life." ~ David Kekich

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✓   Review as often as you need to, to keep things off your mind.

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By now, you are capturing everything, you have your next actions for every task and project, your lists, files, and resource materials are organized, and you are reviewing everything periodically so that you know it is current, clean, and complete. Now, you only need to decide what to do and when to do it. In a sense, this is the purpose of the steps you've taken up until now. Typically, deciding what to do when is a gut decision, an intuitive choice. And with the work you've done up to this point, you can *trust* in your decision making, rather than *hope* you're doing the right thing.

There are a couple of different models you can use to help you decide. One is a way to evaluate your work, one is a way to choose actions in the moment.

When you are "working", you are likely doing one of three activities: (1) Defining your work. (2) Doing pre-defined work. (3) Doing work as it comes up.

Defining your work is much of what the other 4 steps are about. You're clearing your in box, you're answering e-mail, you're reviewing your notes to see what actions they contain. If tasks are 2 -5 minutes or less, you are doing them as you come across them.

A lot of your doing consists of performing the next actions you've defined -- making phone calls, sending e-mails, working on projects, doing the tasks that your job requires. If you've gotten everything out of your head and into your system, you can know that your choice of what do now is the best choice.

Doing work as it comes up. Frequently, unexpected and unforeseen tasks or activities come up that you must deal with. Ad-hoc meetings, "fires" to put out, opportunities that arise. When you choose to deal with these now, you are choosing to postpone other activities. And that is fine. Now, with your system in place, you know what is more important and where your priorities lie, and can choose accordingly.

How do you decide in the moment what you should do? Here are 4 criteria that you can use to make the decision: context, time, energy level, priority.

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Context. Some tasks can only be done at a certain location: at the computer, on the phone, at work, at home, and so forth. Based on where you are right now, this automatically rules out some activities and brings others to the fore.

Time. If you have 10 minutes before an important meeting, you wouldn't begin an activity that will take 30 minutes to complete. On the other hand, if you have a 2 hours of uninterrupted time, you could choose a task that needs your undivided attention and a big chunk of time.

Energy level. Do you know when your energy is typically highest? It's different for different people. Morning people are more awake, alert and energetic before noon. Some people don't reach their peak till 3:00 PM or later. And night owls may be at their best late at night. It's a good idea to choose the work that needs your best efforts during your peak hours. Choose your activities based on the energy they'll require and the amount you have to give right now.

Priority. All else being equal, you want to choose your higher priority items to accomplish. Given the context - where you are, the time you have available, and your energy level, what action will give you the best result? Here is where your intuition comes into play. And if you're playing by the rules of the productivity model, you'll make better choices.

And that's it! You have now a model and a method for improving your productivity and a way to help you feel confident that you aren't forgetting something important. Like any new thing that you learn, it may seem slow and difficult at first, but keep practicing. You'll be well rewarded if you make this an integral part of your life management.

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"Ultimately and always you must trust your intuition. There are many things you can do, however, that can increase that trust." ~ David Allen

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Resources

This model is based on the work of David Allen. If you are interested in a much more comprehensive treatment of this model, I recommend *Getting Things Done.* You can find this and much more at his web site, http://www.davidco.com/.

Allen, David. *Getting Things Done - The Art Of Stess-Free Productivty.* New York: Penguin Books, 2001

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