

WEEKLY REVIEW:

1. Review past and next week.
2. Review mission statement and goals.
3. Develop Goal & Project Plans, add more action steps as needed, update & print.
4. Select items to take action on this week from calendar, repeating tasks, Goal & Project Plans, & self development plan.
5. Plan menus for the week and schedule next action items.
6. Review ideas:someday/maybe list, update & print.
7. Check follow-up system.

- Calendar
- Mission Statement
- Goal & Project Plans
- Repeating Tasks
- Ideas: Someday/Maybe
- Next Actions to do List

DAILY REVIEW

Review calendar/weekly plan

Empty inbox

Next action review

- top priorities
- add/delete

Project review

- add next actions
- follow-up/waiting for
- problems to solve

Ideas/someday-maybe review

- add/delete
- decide to act on

Areas to spend more time on

Collect incoming tasks

Stuck?

Add next actions to/from projects

Plan for tomorrow:

Review day, review weekly plan, plan next day

EVALUATE

WHY do I want to achieve this?

WHICH ideas will make best use of my talents?

Which will provide the greatest value?

Which fit the mission statement?

WHAT is the idea? What would the result look like? What are the chances of achieving it? What actions need to be taken? What will be learned or improved?

HOW could it be accomplished?

What resources are needed? How much do I want to achieve this?

WHO is involved? What is the effect on others?

WHEN will it be accomplished? Is there a deadline? How long would it take?

WHERE will it happen?

SET PRIORITIES

“What’s the best use of my time right now?”

10-High return on investment
10-Deadline due today

5-Contributes to goals
5-Few steps to results
5-Few resources needed

2-necessity
2-planning
2-relationships

A-important tasks that contribute to goals-MUST do
B-moderately important-SHOULD do
C-least important-COULD do

Quadrant I-important & urgent
Quadrant II-important, not urgent
Quadrant III-urgent, not important
Quadrant IV-not urgent or important

Project Plan

Today's Date:

Project statement:

Life area:

Difficulty level:

Costs:

Benefits:

Action Steps:

Possible obstacles:

Solutions:

Target date:

Reward:

Signature:

INCOMING TASKS

Communications:

- email
- mail
- messages
- notes
- telephone
- conversations

Events:

News: television/radio/newspaper articles
community & work calendars

Date sensitive-calendar
Act on now-next actions
More than one step-project
Future action-follow-up
Ideas-maybe/someday

DECIDE

do
delete
defer
delegate (forward)
drawer (file)

FOLLOW UP

- Deferred actions
- Task start & due dates
- Meeting materials
- Phone call-backs
- Bill paying
- Tickets
- Tracking projects
- Delegated tasks

REMIND YOURSELF

Tickler System

- Calendar + Pending file
- 4 Files: This month, next month, this week, next week
- Files for each month + day
- Send yourself an email
- Call & leave yourself a message

With sticky notes on

- The telephone
- Computer monitor
- Coffee cup
- Car dashboard
- Refrigerator
- television

ACTION STEPS

Less than 2 minutes-do
More than 1 step-project

ACTION VERBS

- call
- email
- draft
- fax
- fill out
- review
- find
- gather
- buy
- purge
- look into
- research
- measure
- read
- write
- meet
- measure
- plan

TIME WASTERS

Low Returns – NO Returns

Key Question: “Is this activity providing results or needed and real relaxation, or is it an escape or comfort activity that has continued for too long?”

Playing computer games

Talking on the phone

Watching tv

Surfing the web

Checking email

Meetings

Over planning