

# Workflow Management

*Department of Success*

# Nature of work

- ~ Doing more with less
- ~ Evolving complexity
- ~ Entrepreneurial mindset
- ~ Embrace work-life balance (how?!)



# Communication

- ~ Interrupt load/sources
  - ~ Paper/snail mail
  - ~ Email, texting, SMS
  - ~ Voice mail
  - ~ Social media
  - ~ Voice recorders
  - ~ Note-taking devices

# Boundary issues

- ~ When is end of work day?
- ~ When is “personal time?”
- ~ React vs. Respond
- ~ Time is only fixed, common resource
- ~ Clarity of priorities

# Power of context

- ~ Power of disengagement
- ~ Apply focus to task/event at-hand
  - ~ Minimize distracting thoughts
  - ~ Being fully present
  - ~ “Mind like water”
- ~ Trust system to clear psychic RAM

# GTD<sup>®</sup> Workflow

- ~ 1. Collect
- ~ 2. Process
- ~ 3. Organize
- ~ 4. Review
- ~ 5. Do

# 1. Collect

- ~ Minimize types of inboxes
- ~ Have portable mechanisms for capture
- ~ Mindsweep
- ~ Empty buckets regularly
- ~ **Nothing** goes back to “in” (no loops)

## 2. Process

- ~ “Stuff” goes into inbox(es)
- ~ Actionable?
  - ~ Yes => project planning, *next action*
    - ~ 2-minute-rule, delegate or defer
  - ~ No => reference, someday, or trash



# 3. Organize

- ~ Projects: clearly defined outcomes
  - ~ Require  $> 1$  action step
  - ~ Gather/store reference out of sight
- ~ Time-sensitive activities
- ~ Next-action categories
  - ~ Contexts, someday/maybe, tickler
- ~ Reference: topic-specific, general

# 4. Review

- ~ CEO-level review (weekly)
- ~ Hardscape/calendar (daily/weekly)
- ~ System of organization
  - ~ Projects
  - ~ Next Actions
  - ~ Waiting For

# 5. Do

- ~ Context, time, energy, priority
- ~ Executing, reacting, defining
- ~ Life
  - ~ Vision
  - ~ Goals
    - ~ Areas of responsibility
    - ~ Current projects
    - ~ Current actions



Oh what to do, what to dooo?

# Tools

- ~ Physical inbox
- ~ Reference filing system
  - ~ A-Z order
  - ~ Hanging files + file folders
  - ~ Easily flowing
  - ~ Label maker

# Tools (2)

- ~ Email system
- ~ Calendar
  - ~ Google, iCal, Outlook, Day Planner
- ~ Task organizer
  - ~ [www.rememberthemilk.com](http://www.rememberthemilk.com)
  - ~ Things, Outlook, OmniFocus, Day Planner



# PROBLEM SOLVING

There are few of life's problems that cannot be solved with the proper application of a high explosive projectile

# Project Planning

# Planning model

- ~ Defining purpose and principles
- ~ Outcome visioning
- ~ Brainstorming
- ~ Organizing
- ~ Identifying next actions

# Class project

- ~ Implement workflow system
  - ~ Calendaring system
  - ~ Task management system
    - ~ Minimum (3) actionable contexts
      - ~ e.g @Calls, @Errands, @Computer
    - ~ Timeliness/reminder feature
    - ~ Projects, Waiting For, Someday



# Class project (2)

- ~ 90-day action plan for business
  - ~ Identify at least one major project
  - ~ Brainstorm (outline/mindmap)
  - ~ Define sequence of  $\geq 5$  action steps
  - ~ Assign next actions to context/  
calendar for completion

# References

- ~ *Getting Things Done*, David Allen
- ~ [www.davidco.com](http://www.davidco.com)