

Exercise

This exercise will help clear your mind of all your unresolved tasks. While you can complete this activity by yourself, it's recommended that you work with a partner. This exercise will take approximately one hour to complete.

By Yourself—Read the first trigger item on the list aloud. Think about that trigger. If any unresolved task comes to mind, write it down. If nothing comes to mind, move on to the next trigger, repeating this process until you have completed the exercise.

With a Partner—Have your partner read the first trigger item on the list aloud. Think about that trigger. If any unresolved task comes to mind, write it down. If nothing comes to mind, say "next." Your partner should move on to the next trigger, repeating this process until you have completed the exercise.

Business

Focus: Leadership

- Company/department values, vision, mission
- Leadership training
- Time management
- Personal systems
- Personal development
- Skills to learn or improve
- Books to read
- Important read & review
- Decisions to tell employees
- Networking
- Items to disengage from
- Questions to ask & consider
- Items to discuss with coach
- Exit or harvest strategy
- Business ideas
- Ideas for expansion

Focus: Personnel

- Meetings with co-workers
- Meetings with contractors
- Organization chart
- Hiring or firing
- Managerial training
- Events or Meetings to plan
- Employee loyalty projects
- Commitments/promises to coworkers
- Getting to know & serving coworkers
- Coworkers' evaluations & reviews
- Waiting for: something from coworkers
- Position descriptions
- Responsibilities to delegate
- Follow-up on delegated items
- Managerial systems
- Ideas for organizational change

Focus: Marketing

- Marketing projects, incomplete or new
- Documents for marketing or advertising
- Waiting for: something from marketing
- Company/office decor
- Advertising campaigns
- Web site items
- Online research
- Target market analysis
- Research: competitors
- Research: market/industry
- Strategic alliances or partnerships
- Professional wardrobe or uniforms
- Marketing systems
- Marketing message ideas
- Ideas for advertising campaigns

Focus: Customers/Stakeholders

- Commitments/promises to customers
- Customer/Stakeholder loyalty projects
- Customer/Stakeholder loyalty training
- Complaints to resolve
- Best supporters—re-contact
- Best supporters—gifts & perks
- Customer/Stakeholder loyalty systems
- Waiting for: customer reports/feedback
- Waiting for: something for customers
- Waiting for: something from customers
- Ideas for customer/stakeholder loyalty

Focus: Product/Services

Fulfilling promises made by marketing
Inventory
Production equipment
Service representative training
Outsourced suppliers
Meeting with outside sales reps
Production systems
Ideas for new products
Ideas for new services

Focus: Sales

Follow-through: prospects
Groups or associations to join
Presentations
Referrals
Sales forecasts
Sales quantification/tracking/reports
Sales training
Re-contact old customers
Sales systems
Waiting for: prospect replies
Waiting for: sales reports/feedback
Ideas for new sales systems

Focus: Business/Org Finances

Meetings with financial professionals
Accounting & bookkeeping
Invoices & accounts payable
Waiting for: accounts receivable
Budgets
Financial reports (P/L, cash flow, balance)
Cash flow management & credit lines
Financial analysis/strategic planning
Waiting for: financial reports
Money security, checks & balances
Customer identity security
Petty cash
Reimbursements & requisitions
Financial systems
Ideas for money liabilities to lose
Ideas for money assets to purchase

Focus: Administration

Gathering points
Office organization/layout
Building maintenance
Utilities
E-mail
Faxes
CRM or contact software
Other software
Computers, monitors, printers
Cell phones or office phones
Internet & network
Computer/IT unification
Computer backup
Computer security (firewall, virus, etc)
Desks, chairs, furniture
Filing cabinets, folders, archives
Physical inboxes, outboxes
Equipment to buy
Supplies to buy
Travel-related items & tasks
Reference documents: personal
Reference documents: company
Safety & emergency protocols
Systems: operations manual
Systems: new training documents
Ideas for facilities changes

Personal

Focus: Self

Personal values, vision
Personal goals
Physical health: exercise
Physical health: nutrition
Mental health
Spiritual health
Doctors, dentists, specialists
Waiting for: medical data
Personal trainers/coaches/mentors
Books to read
Education
Hobbies
Talents to develop
Stress management
Commitments/promises to self
Meditation
Ideas for recreation
Dreams

Focus: Family

Commitments/promises to family
Couple values, vision, goals etc.
Important discussions: couple
Important discussions: children
Recurring dates/recreation with spouse
Recurring recreation with children
Family events & recreation
Family projects
Birthdays, anniversaries, holidays
Weddings, graduation, significant events
Waiting for: something from family members
Family meetings, planning, discussion
Ideas for family recreation

Focus: Personal Finances

Financial vision, goals
Budget & cash flow
Bills to pay
Credit cards
Utilities
Tax-related items
Allowances
Banks & other financial institutions
Mortgages & repayment plans
Loans & repayment plans
Accountant, lawyer, financial planner
Real estate
Landlord
Investments
Estate & retirement planning
Waiting for: rebates
Waiting for: financial information
Financial dreams
Pets
Clothes
Errands
Ideas for home improvement

Focus: Friends & Community

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Commitments/promises to friends
People to get to know
Community groups, clubs, to join
Social events
RSVPs (waiting for or to send)
Sporting events
Community events
Community service projects
Waiting for: community info
School/Institution events
Church/Spiritual service
Legal, crime, security issues
Emergency preparedness
Homeowners association items
Waiting for: items lent
Borrowed items to return
Items to disengage from
Ideas for community service

Focus: Home

Filing & reference plan
Gathering points
Areas to organize, clean
Builders & contractors
Heating & air-conditioning
Plumbing: fixtures, toilets, shower
Electricity, light bulbs, wiring
Roofing
Landscape & driveway
Garage & storage
Walls, floors, ceilings
Décor, furniture, accessories
Kitchen appliances
Closets
Computers, printer, monitor
Software
E-mail
Computer backup
Internet & home network
TV, cable, satellite
DVDs, CDs, digital media
Cameras, film, digital pictures
Phones & voicemail
Sports equipment
Vehicle repair: external & internal
Vehicle maintenance: major & minor
Tools
Luggage
Pets
Clothes
Errands
Ideas for home improvement