Worksheet

This worksheet will help you identify all the gathering points in your life. Gathering points are physical locations where you gather *unprocessed* items. These items include mail, emails, tasks, to-do's, ideas, busy work, assignments, projects, reminders and more. *Unprocessed* means you haven't clearly decided yet 1) **What** to do with it 2) **When** you are going to do it and 3) **Where** it's home is.

For each type of gathering point, write a number representing the total number of *all* gathering points where you currently have "stuff." For instance, if you have three different voicemail boxes, write the number "3" next to "Voicemail Boxes."

3	Voicemail [Count 1 for each account]

Once you have completed each row, tally up your numbers and write the sum in the "Total" box. The "Target" box is to help you set a goal for the number of gathering points you would like to achieve

#	Gathering Point	#	Gathering Point
	Areas in Car (Glove box, each seat, trunk, etc.)		Office Physical Boxes (In, out, etc.)
	Assistants (Spouse, secretary, co-workers)		Other
	Calendars (Paper, digital, Outlook, etc.)		Other Office/Work Areas (Storage, etc.)
	Clothing Pockets		Outside Home Areas (Garage, shed, yard, etc.)
	Computer Desktop Screen		Paper Notepads (Business, Personal, etc.)
	Computer Task List (Outlook, Spreadsheet, etc.)		Paper Task Lists, To Do Lists, etc.
	Contact or CRM Software (ACT, Goldmine, etc.)		PDA Task List (Palm, Pocket, PC, etc.)
	Desk Areas (Each spot, under, inside, etc.)		Post it Note "Posting" Areas [1 for each area]
	E-mail Inbox [Count 1 for each account Inbox]		Scraps of Paper (Receipts, napkins, etc.)
	Filing Cabinets [If used for unprocessed "stuff"]		Text Messaging (Phone, MSN, Yahoo, etc.)
	Floor Areas [Both office and home]		Voice Recorder [If used for tasks, ideas, etc.]
	Home Areas (Kitchen table, fridge, boxes, et		Voicemail [Count 1 for each account]
	Home Desk Drawers		Wallet/Purse/Planner/Briefcase Pockets
	Home Physical Boxes (In, out, whatever, etc.)		Whiteboard/Corkboard [If used for tasks, etc.]
	Office Desk Drawers		Your Mind [Count as 1]
	Subtotal		Subtotal
			Total
			Target

Exercise

This exercise will help you identify your most valuable activities.

1. Begin by listing the activities you perform at work in the first column. Each activity should appear in a unique row. (i.e. – managing employees, booking travel, janitorial work, etc…)

2. Enter an estimated average annual salary for someone performing this activity full-time in the second column. If unsure, search online to find an estimated salary.

3. In the third column, calculate the hourly wages for each activity, by dividing the estimated annual salary by 2,080. (2,080 = 52 weeks * 40 hours)

4. Finally, rank each activity according to value per hour. So, if you had activities with estimated wages per hour of $10, $20 and $30, then they would be ranked as follows: $30 (1); $20 (2); $10 (3).

5. Once you've ranked all of these activities, you can identify your top two most valuable activities.

Activity	Est. Salary	Est. Wage/Hour	Rank
Travel	_____	_____	
Wasting time	_____	_____	

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

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

Focus: Friends & Community

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: 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

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

Exercise

Are you really multitasking… or are you switchtasking? The following exercise will help you quickly understand the negative impact in efficiency caused by switchtasking.

Step 1

1. Have a timer with a second hand ready. For best results have another person time you.
2. In the first row, re-copy the phrase *"Multitasking is Worse Than a Lie."* After copying the entire phrase in the first row, then switch to the second row and write the numbers 1-27.

Like This:	M	*Multitasking is worse than a lie*
	1	*1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27*

3. Ready, Set, Go! (After you have completed the last number (27), write down your total time to completion.)

M	
1	

Time to complete

Step 2

1. Have a timer with a second hand ready again.
2. In the first row, copy the phrase *"Multitasking is worse than a lie."* For every letter you write in the "M" row, switch to the second row (labeled "1") and write the corresponding number.
3. Ready, Set, Go! (After you have completed the last number (27), write down your total time to completion.)

M	
1	

Time to complete

Compare the time to completion between the first and second pass. Typically, a person will take twice as long to complete this exercise when switchtasking (second pass) vs. focusing on one task at a time (first pass).

Resource Check List

The following list of resources is recommended for completing the action section of this training (chapters 8–11). As these items will be directly referenced, it is recommended that you have these items on hand prior to beginning this portion of the course.

Large file boxes (minimum 8)

Electronic labeler (with batteries if necessary)

DVD/CD storage wallet

Desk inbox, legal size (at least 3" deep)

Hanging file folders (letter or legal size, minimum 50)

Manila folders (minimum 100)

Alphabetical tabs or guides for hanging file folders (2 sets)

Stacking letter trays (minimum 6)

Calendaring system (install relevant software in advance, or, if using paper planner, which is not recommended—Planner pages showing week view, with hour-by-hour and tasks for each day)