

# Workflow, Priorities, and Project Planning

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# Topics

- Why “productivity”?
- Getting Organized – Workflow
- Priorities – Horizons of Focus
- Project Planning – Five Steps to Clarity

# Why productivity?

- More work, less time, fewer resources
- Are you
  - driven by the latest and loudest?
  - failing to make time for long-term projects?
  - drowning in email, paper, phone messages?
  - losing great ideas?
- “Knowledge Work” (Drucker)
  - Much of our work is “fuzzy” – somewhat undefined

# Why productivity?

- “Work” can come from any direction at any time
  - Phone
  - Email
  - Paper mail
  - Website
  - News
  - Random thoughts

# Why productivity?



# Exercise

- Take the next 2 minutes and make a list
- What's on your mind right now?
- Examples
  - Pick up dry cleaning
  - Deal with problem employee
  - Retention study
  - Mom
  - College fund for kids
  - Why am I here? (existentially speaking)

# Exercise

## To Do List

- 1) Make to do list ✓
- 2) Check off first thing on to do list ✓
- 3) Realize you've already accomplished ~~2~~ things ✓
- 4) Reward yourself with nap (in progress)

# Exercise

- How many of you feel at least a little better having written down your list?
- Why? What has changed?
- “Distributed cognition”
- $7 \pm 2$



# “Get Organized”

- Traditionally thought of as a single step
- Most organizing is “rearranging incomplete piles of unclear stuff” – David Allen
- “Get organized” is just one step of five...  
and it’s not even the first step
- Really a work flow process

# Getting Organized



# Getting Organized



# Habit #1: Collect

- Capture everything that has your attention
  - Paper
  - Email
  - Voice mail
  - Meeting notes
  - Conversations
  - Ideas

# Habit #1: Collect

- Have as few “buckets” as possible but as many as you need
  - Inbox (home & work)
  - Email inbox(es)
  - Voicemail
  - Smartphone
  - Voice recorder\*
- Empty them regularly

# Habit #1: Collect

Bottom Line:

Get it out of your head.

# Getting Organized



# Habit #2: Make a decision

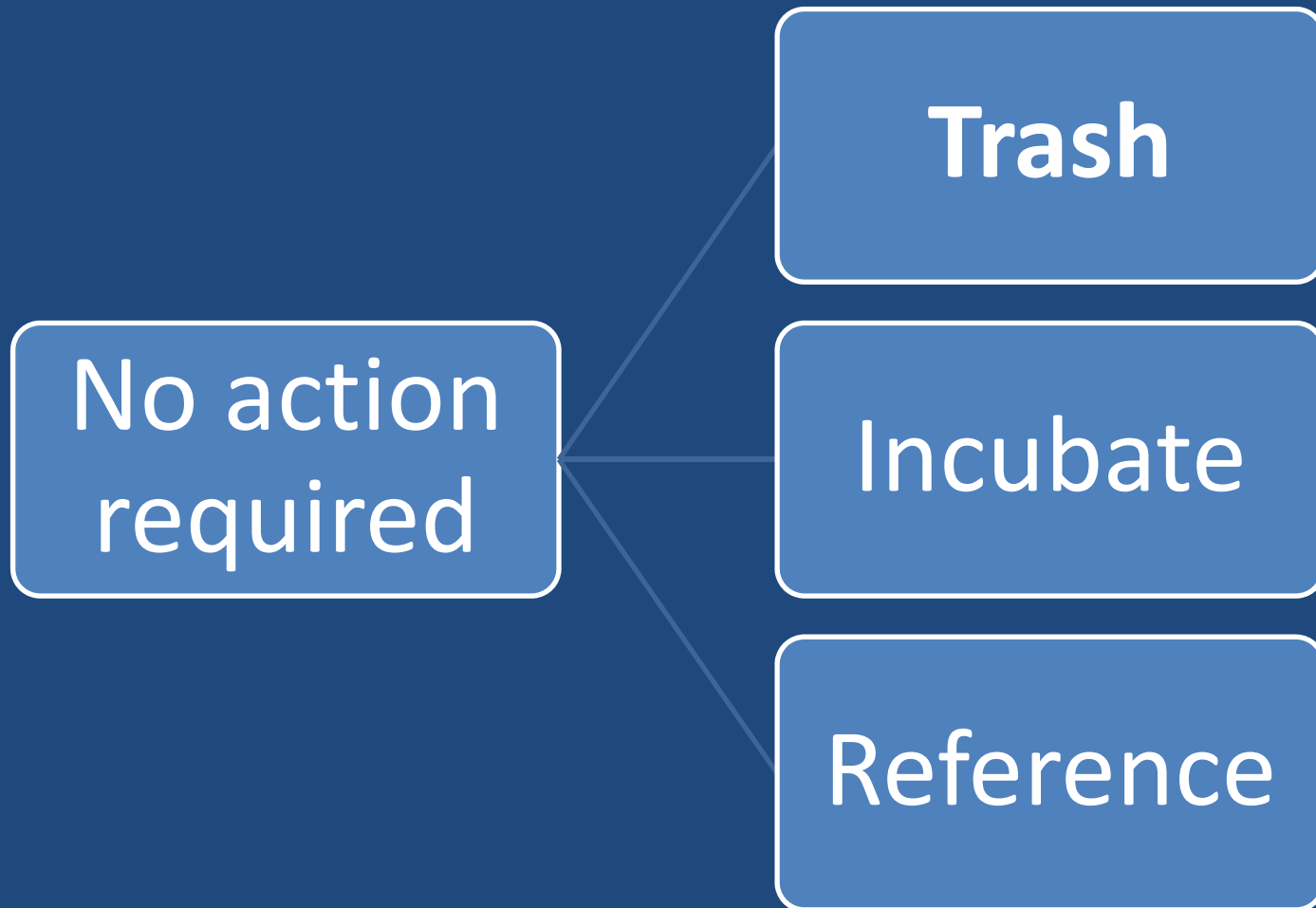
- Process each of your “buckets” to empty on a regular basis
- “What does this mean to me right now?”
- Or, do your thinking when it shows up, not when it blows up!



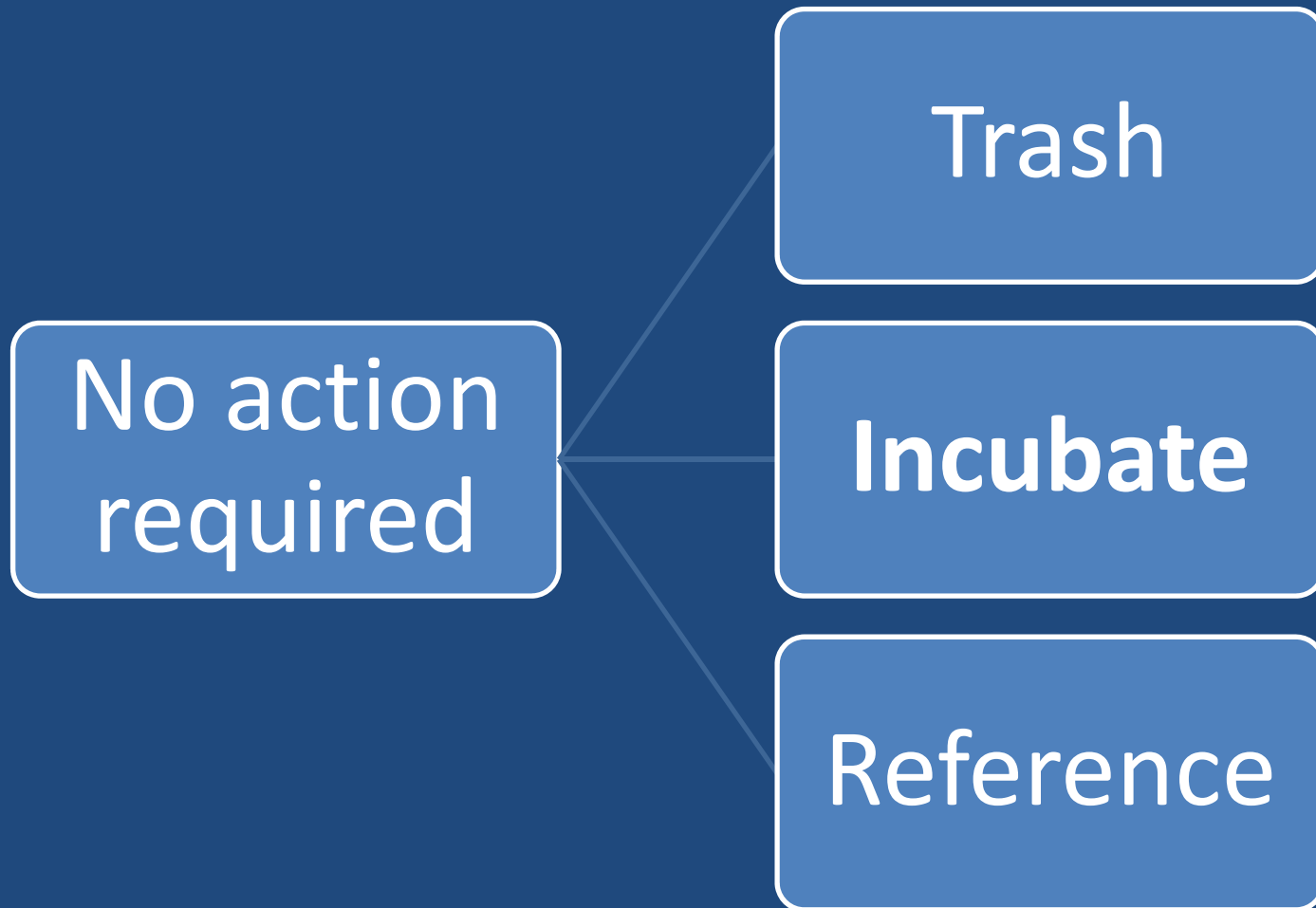
# Process & Clarify



# Process & Clarify



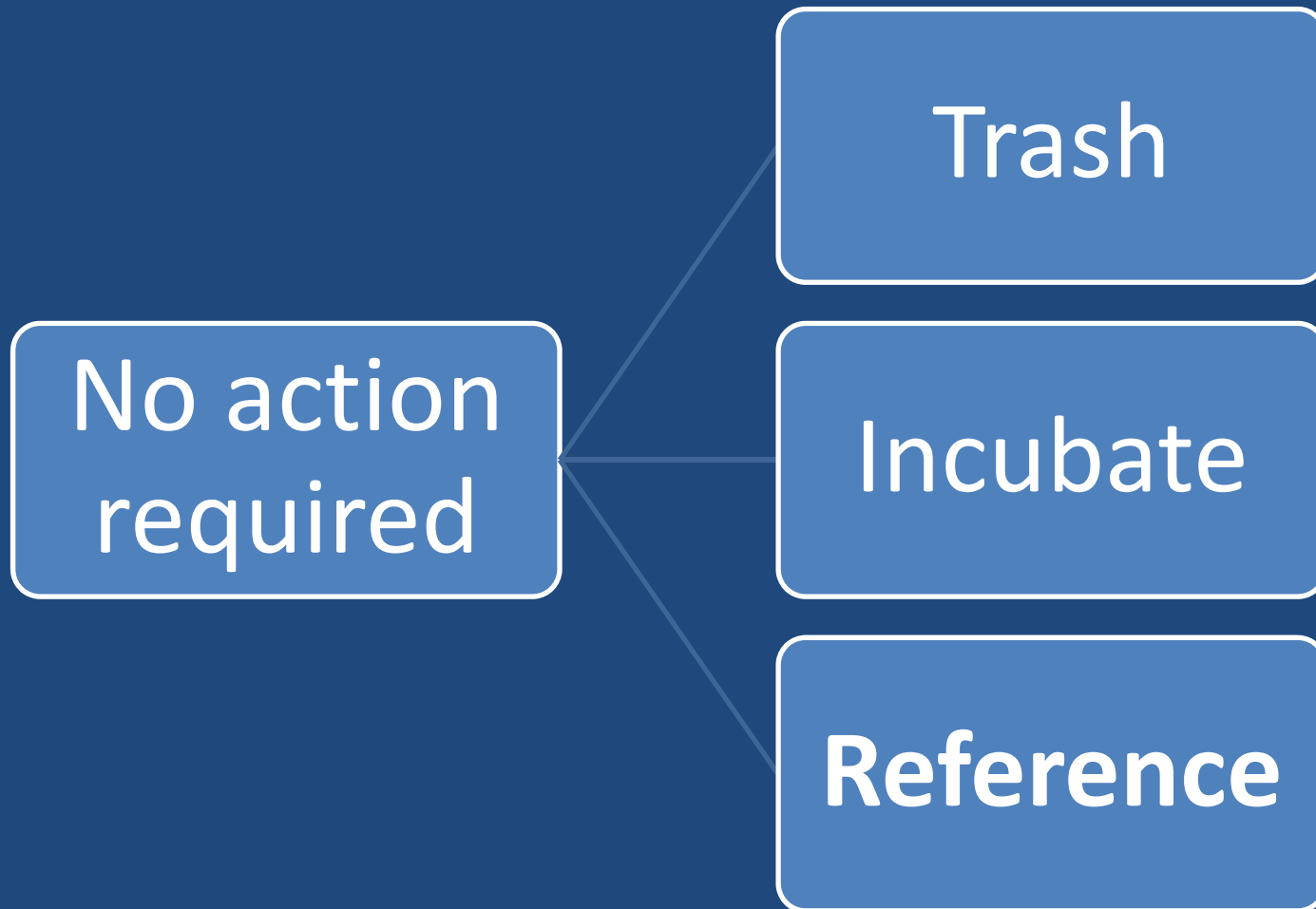
# Process & Clarify



# Process & Clarify - Incubate

- Tickler items
  - Specific date/time items
  - “I don’t want to decide right now”
- Someday/Maybe lists
  - “Neat vacation idea, but not this year”
  - Things to do with kids
  - Restaurants to try
  - “Bucket” lists

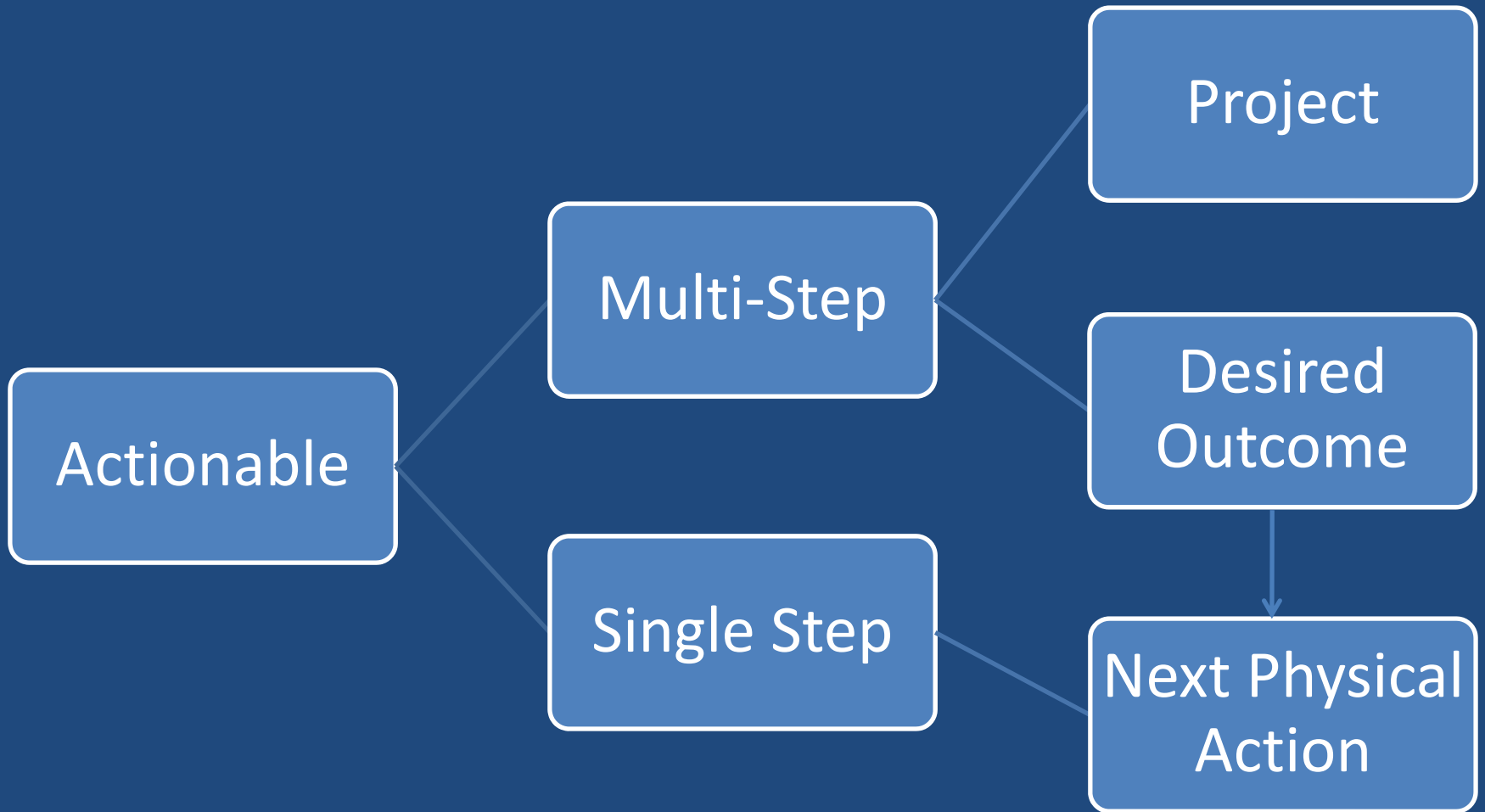
# Process & Clarify



# Process & Clarify - Reference

- Email
- Memos from HR
- Phone directories
- Policy documents
- Project reference material (non-actionable)
  
- Keep it simple
- Make it work for you

# Process & Clarify



# Process & Clarify

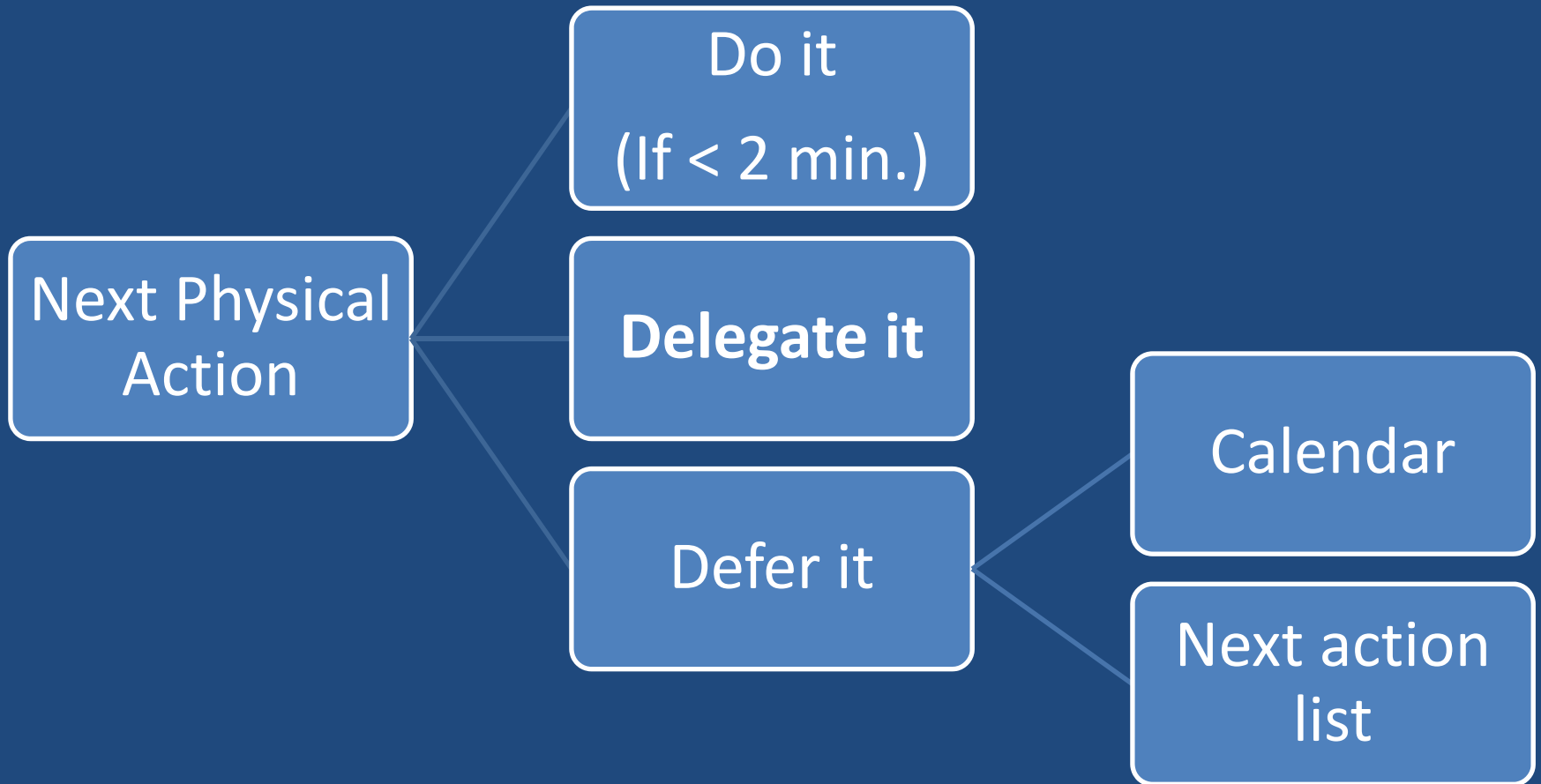




# Process & Clarify

- The 2 Minute Rule
  - Two minutes is about the breakeven point
  - Not worth the time to track short actions
  - Get a timer and practice

# Process & Clarify



# Process & Clarify



# Process & Clarify

- Seven things you can do with 'stuff'
- Trash it, incubate/tickle it, file it
- Identify projects
- Decide the next action
  - Do it (< 2 minutes)
  - Delegate it
  - Defer it (Calendar, action lists)

# Getting Organized

- Most organizing is “rearranging incomplete piles of unclear stuff” – David Allen
- Habit #1 – Collect
- Habit #2 – Process & Clarify (Make a decision)

# Getting Organized



# Organize

- Group the results of processing into 7 main categories
  1. Projects you are committed to finish
  2. Calendar (must occur on a specific date/time)
  3. Next actions (> 2 minute actions to be done as soon as possible)
  4. Waiting for (things you've delegated)
  5. Reference files
  6. "Tickler" file
  7. Someday/Maybe lists

# Organize

- Too many lists!
- Question isn't how many lists to keep
  - Where will you keep them?



# Organize – Projects

- What is a “project”?
  - Anything you are committed to finish
  - Takes more than one action to complete
  - Complete within 12-18 months
- Much broader definition than usual

# Organize - Next actions

- Really multiple lists
- Organize your next actions by context
  - Calls to make
  - At computer
  - Office
  - Home
  - Errands
  - Online

# Organize – Waiting for

- A list of things you've delegated
- Review as needed
- Tip: BCC yourself on emails where you request something
  - Set up rule to autofile these emails to a “Waiting” folder

# Organize – Tickler File

- Also called a suspense file
- Defer things to a later date
- Electronic items can be incorporated into your calendar
- Paper items – 43 folders
  - 12 monthly folders
  - 31 daily folders

# Organize – Someday/Maybe

- Keep track of things you aren't committed to
  - Future work projects
  - Vacation ideas
  - Kid's activities
  - Books to read
  - Restaurants to try
  - Home improvement ideas
  - Want to buy

# Getting Organized



# Review

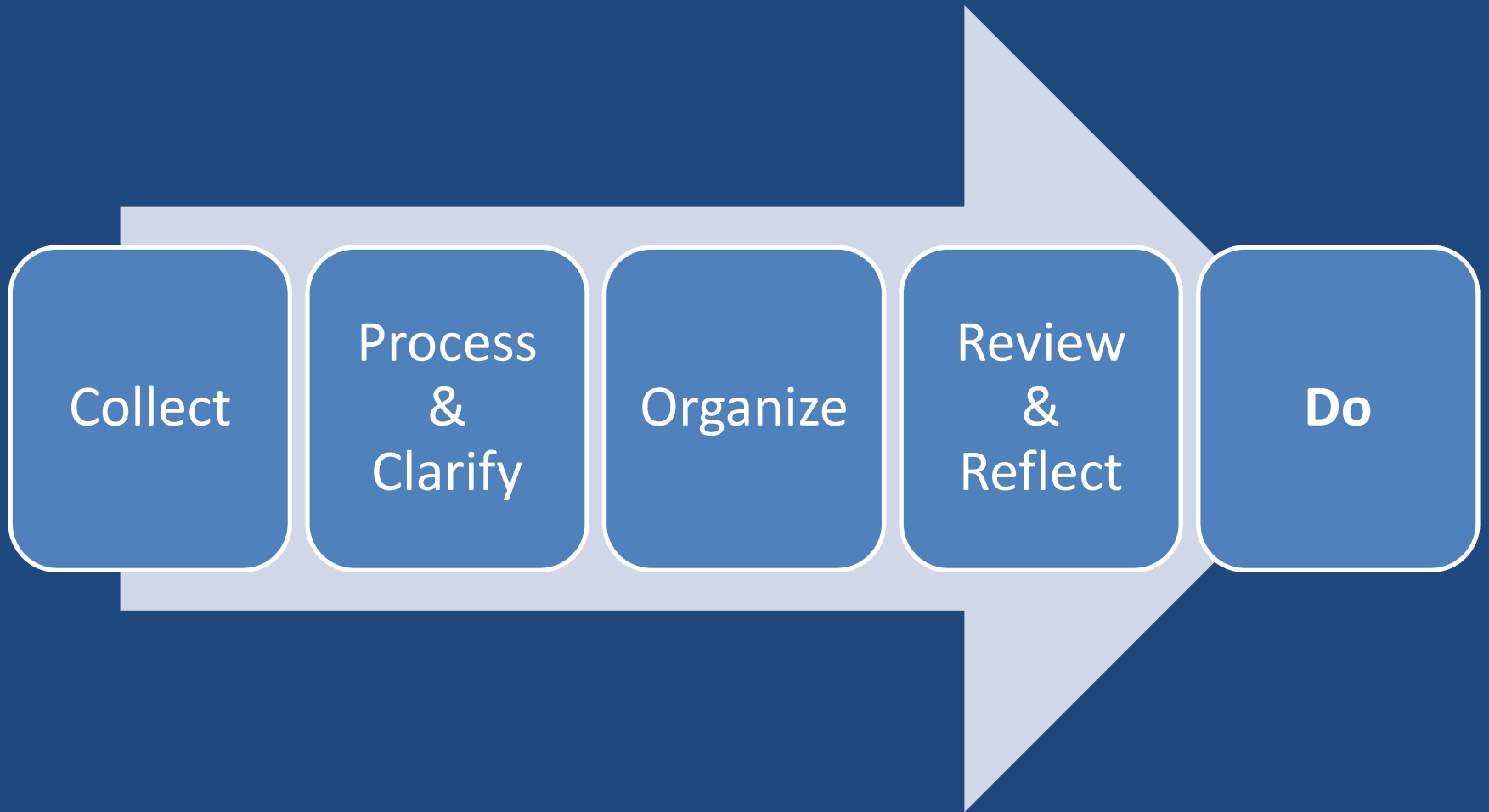
- Review calendar and action lists as needed
- Conduct a weekly review (1-2 hours)
  - Get everything to zero/empty
  - Review and get current on all projects
  - Review longer-term commitments and levels of focus
  - Get creative

# Review

- The weekly review is the key to the whole system
- Without review, it will all creep back into your head
- It will be the best 1-2 hour of your week and you will feel better afterwards



# Getting Organized



# Do

- Make choices about what to do based on
  - Context
  - Time
  - Energy level
  - Priorities
- Types of activity
  - Doing predefined work (next actions)
  - Doing work as it shows up (the call from the boss)
  - Defining work (processing inputs, planning projects)

# Exercise

- Example
  - Pick up dry cleaning
  - Deal with problem employee
  - Retention study
  - Mom
  - College fund for kids
  - Why am I here? (existentially speaking)

# Exercise

- Example
  - Pick up dry cleaning (@errands)
  - Call Sally in HR at x12345 re problem employee (Project, @call)
  - Research retention forecasting (Project, @office)
  - Research weekend trip with Mom (Project, @online)
  - Call Financial Advisor re setting up College fund (Project, @call)
  - Revisit purpose in 1 month (tickler file)

# Exercise

- Take your list from the first exercise
- You've collected, now process and organize
- How many of you feel at least a little better having been through this process?
- Why? What has changed?

# Control versus Perspective

- Workflow is all about getting control
- What to do right now?
  - “Get your priorities straight!!”
  - Which priorities?
- What does “Put first things first” have to do with my daily life?

# Perspective

- Purpose/Principles
- 3-5 year vision
- 1-2 year goals
- Areas of focus
- Current projects
- Current actions
- 50,000 feet
- 40,000 feet
- 30,000 feet
- 20,000 feet
- 10,000 feet
- Runway

# The Runway - Actions

- Current actions
  - Where control intersects perspective
- Key question:

What do I need to do?
- Review whenever you have discretionary time



# 10,000 feet - Projects

- Key question:

What do I need to complete?

- Project verbs:

- Finalize, Implement, Research
- Publish, Distribute
- Submit, Handle, Resolve
- Learn, Set Up, Create

- Review weekly

# 20,000 feet – Areas of Focus

- Key question:

What do I need to maintain?

- 10-15 categories
  - Reporting, accreditation, budget/finances, staff development
  - Spouse, parent, personal growth
- Review quarterly or as needed

# 30,000 feet – Goals

- Key question:

What do I want to achieve?

- 1-2 years out
- Some overlap with projects
  - Key difference is how often you need to review
- Review quarterly/annually

# 40,000 feet – Vision

- Key question:  
What does long-term success look/feel like?
- 3-5 years out
- Review annually

# 50,000 feet – Purpose/Principles

- Key questions:

Why am I here?

What are my “core values”?

- Review annually
- Hardest to figure out
  - Most of us can't get here until the lower levels are resolved

Questions?

# Projects

- The majority of the tasks you have will be related to a larger project
- Good news – you don't need project planning software to do projects
- Bad news – you DO need something
  - For most projects: 1 pencil, 1 piece of paper
- When you get a 'project' in your processing, what do you do?

# Projects – 5 Steps

1. Defining purpose and principles
2. Outcome visioning
3. Brainstorming
4. Organizing
5. Next actions



# Projects – Purpose

- Why are we doing this?
- Does it align with our goals?
- What are the key standards to making decisions about the project?
- Where is the “box”?
  - Laws
  - Regulations/policies
  - Customs/unwritten policies
  - “Button Poppers”

# Projects – Outcomes

- What does success look like?
- If this project was totally successful, what would that look like?
- How would we know?
- What would success look like to others?

# Projects – Brainstorming

- What are all of the thoughts that occur to me about this project?
- What do I know? What do I not know that I need to know?
- Who do I need to talk to/get permission from?
- What crazy ideas do I have about this?
- Try mindmapping

# Projects – Brainstorming

- Be complete and non-judgmental
- Try to view from all sides

# Projects – Organizing

- Identify related groups of items
  - Subprojects
  - Dependencies
- What must happen to make the project work?  
(Critical factors)
- Create planning materials
  - Bulleted lists
  - Charts
  - Outlines

# Projects – Next Actions

- What are the very next physical actions we need to take on the subprojects?
- Who is responsible for those actions?
- If more planning/information is needed, what next action will get that to happen?

# Exercise

- Take 5 minutes and plan a project using one of the project planning worksheets
- Project ideas
  - Develop a model to forecast retention
  - Produce an accreditation report for SACS
  - Support a program review of an academic department
  - Respond to US News & World Report survey

Questions?



# Summary

- Getting Organized
  - Collect → Process & Clarify → Organize → Review & Reflect → Do
  - Habit #1: Collect/Capture EVERYTHING
  - Habit #2: Make a decision

# Summary

- Six horizons of focus
  - Purpose
  - 3-5 year goals
  - 1-2 year goals
  - Areas of Focus
  - Projects
  - Next Actions

# Summary

- Project planning
  - Purpose & principles
  - Outcome visioning
  - Brainstorming
  - Organizing
  - Next actions

# Questions?

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