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# Planning for Productivity

— Less Stress, More Success

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# Objectives

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- Learn method for processing information and requests that is based on
  - Taking action quickly
  - Referencing needed material in easily accessible ways
- Have tools for organizing projects and “to do” lists that make them more powerful tools to accomplish tasks

# The Problem:

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- Multiple demands on limited time
- Inability to anticipate timing of requests increases uncertainty
- “To Do’s” left un-captured run amok in our heads



# The Issues: When is work complete – what is good enough?

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- How good could we make that conference?
- How adequate is the treatment plan?
- How motivating can we make the staff meeting?
- Would more data help us to make a better decision?
- Have we communicated adequately to enough stakeholders?

# The Issues: Uncertainty requires us to make risky decisions

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- Lack of clarity about:
  - Organization's priorities
  - Desired outcomes of project
  - Specific next actions needed



# Mental Reminder Function can Run Amok

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- What isn't written down or placed in a physical reminder bin becomes fodder for mind to ruminate about
  - Mind reminds us of things we need to do
  - Can only do one thing at a time
  - So reminder of multiple items leads to stress
- Mind will “let go” of reminder function when physical reminders remove the need

# Need Organized Way to Capture Thoughts and Required Actions

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- No simple answer re:
  - What to do
  - When to do it
  - How to do it
- But can use some practices to facilitate these decisions
  - Make decisions about next actions for every element in our work day
  - Write down each “next action” step
  - Regularly review these lists

# A Realist

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An ***idealist*** believes the short run doesn't count. A ***cynic*** believes the long run doesn't count. A ***realist*** believes that what is done or left undone in the short run determines the long run.

--- Sidney J. Harris

# Processing the “In Basket”

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- Deciding on an action
  - What is the very next thing that needs to be done to move this thing along?
- If no action needed
  - Trash
  - Someday/Maybe
  - Reference

# If Action is needed

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- 2 min. rule
- Delegate (waiting for)
- Calendar (for specific date to do)
- Defer (Next actions – to do as soon as possible)

# Criteria for specific action

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- Call Joe to discuss new accounting software
- Develop draft agenda for next Clinical practice meeting
- Email Joe and Mary draft agenda for comments
- Talk with Pat to set time to discuss training agenda for fall
- Take printer for repair

# Organizing “Next Actions” -- Setting Up Categories

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- A “projects” list
- Project support material
- Calendared Actions and Info
- “Next Actions” list
- “Waiting for” list
- Reference material
- “Someday/Maybe” list

# About Lists:

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## ■ Types

- A file folder with separate sheets for items within the category
- A sheet of paper with category title in a loose leaf binder like an organizer
- A digital list in outlook or a pda

## ■ Keep it simple

- Don't impose a structure or rearrange
- Can see whole thing and decide priorities as situation dictates

# Calendars

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- Two types of entries
  - Specific appts/meetings (meet with Bob at 2:00)
  - Actions to be taken some time that day (call Angie re report)
- **RESIST IMPULSE** to put on calendar action items that aren't a definite commitment
  - Calendar more useful if you can see exactly the time available to you to plug in your action items list

# Organizing “as soon as possible” action items by context/location

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- Errands
- Computer
- Office
- Phone
- Home
- Agendas (e.g. staff meeting, meeting with Pat)
- Read/review (grab some and do while waiting)
- “Low energy” (e.g. data entry)

# Organizing “waiting for” list

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- Tracks deliverables
- Tracks projects where you are waiting for someone else to complete a piece and hand off to you
- Tracks projects where you need to keep track of what others are doing and coordinate
- Review often, at least weekly
- Keep close to own actions list as items may move back and forth from waiting to action

# Organizing email

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- 2 min. action rule applies here
- Set up folders
  - Archive
  - Reference
- Folders to review for action daily:
  - For emails that will take longer than 2 min.
  - For emails sent and waiting for other's actions
- Daily review folders titled to sit at top of folder list – begin with @, #, AA, or other that will force to be at top
- Nothing stays in inbox

# Organizing Projects

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- Project is something requiring multiple actions in order to complete
- What is the desired result?
- How will we get there?

# The Natural Planning Model

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- Purpose (why)
- Principles (boundaries)
- Vision/outcome (destination)
- Brainstorming (alternative paths)
- Organizing (implementation)
- NOTE: there is no organizing, outlining or list-making until the final step

# 1. Purpose

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- Why:
  - Are we having this meeting?
  - Writing this report?
  - Holding this planning session?
- Understanding purpose:
  - enhances creativity
  - increases commitment to act
  - fosters cooperation
  - expands options

# Lack of Purpose

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“Fanaticism consists of redoubling your efforts when you have forgotten your aim.”

George Santayana

# Principles

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- What are the non-negotiables?
- I would give the team totally free rein to do this project so long as they ???
  - Enhanced client care
  - Stayed within budget
  - Ensured a healthy team
- Principles set the boundaries within which to operate

# Vision/Outcome

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- Clarity about what things will look like if the project accomplishes it's aim
- Doesn't describe how to get there
- Focus on "wild success"
- Allows for the natural comparison of the gap between the actual and the ideal
- Necessary for mind to begin to try to fill that gap

# Brainstorming

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- Free wheeling
- Focus on vision of ultimate outcome
- No bad ideas
- No attempts to weed out or organize
- The more ideas laid out the better chance that a good solution will be born from the thinking process
- Everyone contributes

# Organizing results of brainstorming

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- What has to happen in what order to implement ideas
- What is the most important element
- Sort by components, sequences, or priorities
- Detail as needed
- Determine next action steps

# Fixing Planning Problems – Lack of Clarity re Actions

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- Actions seem to lack coherent direction – pull out plan, are you following sequence you laid out, or do you need to lay out more clearly?
- If plan is unclear, may need more brainstorming to generate alternatives for action.
- If brainstorming is bogged down, may need to revisit vision

# Fixing Planning Problems – Not enough action

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- Is there a clear picture of the desired result?
- Have we worked through the “how” at the brainstorming phase?
- What are the critical deliverables and how can we attain them?
- What are the next action steps and who has them?

# Someday/Maybe – the Dream list

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- Things might want to do someday with time/inclination/\$\$
- Regular review keeps you in touch with your dreams, helps set priorities
  - Places to visit
  - New skills to learn
  - Organizations to join
  - Volunteer service to do
  - Projects to start

# Special Categories of “Someday” Lists

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- Things to do with children
- Books to read
- Restaurants to try
- Possible vacation spots

# Acknowledgments:

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