

# Getting Stuff Done Quick Reference Guide

## Tackling Procrastination

- What is one activity that you are putting off right now?
- Why are you putting it off?
- What positive things are resulting from putting it off?
- What are the negative things that are happening as a result of delaying this task?
- What could or will happen if you continue to delay this task?
- What steps need to be taken to complete the task?
- What will the end result look like?
- What is your next step?
- What do you need to do to complete this step?
- When will you have this step completed by?
- Who will help support you?
- When will you review your plan?

## Making the Most of E-mail

1. Commit to your e-mail program
2. Take some training
3. Set up folders
4. Schedule backups and archives
5. Automate what you can
6. Use time-saving tools

### Hot Facts!

In a March 2013 survey by Litmus Email Analytics, the top e-mail clients were:

- Apple products (42% of users)
- Microsoft Outlook (17% of users)
- Windows Live Mail (10%)
- Google Android (8%)

(Source: <http://emailclientmarketshare.com/>, accessed April 2013)

## Using the Incubator

Also known as a pending file system or a tickler file, the incubator will keep all documents that require follow-up in one place. This file should be placed within easy reach but out of sight. A good place might be the top of a filing cabinet, or, if space is short, on a windowsill!

Here is what you will need:

- A hanging file holder
- 12 hanging folders (representing months)
- 31 manila folders (representing days)
- Felt-tip marker and a pen

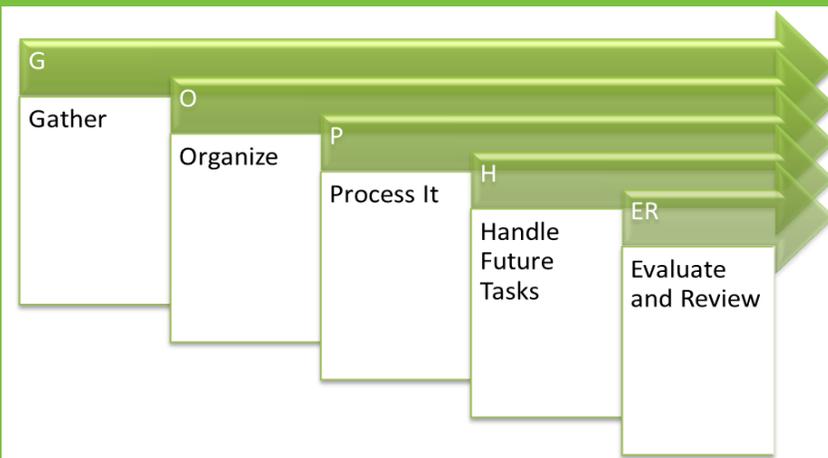
First, label the 12 hanging folders with each month in the year. Arrange them chronologically with the current month in front. Then, label the manila folders from 1 to 31. Put the manila folders for today until the end of the month in this month's folder. Put the remainder of the manila folders in next month's folder.

So, if today is February 12, my incubator will look like this:

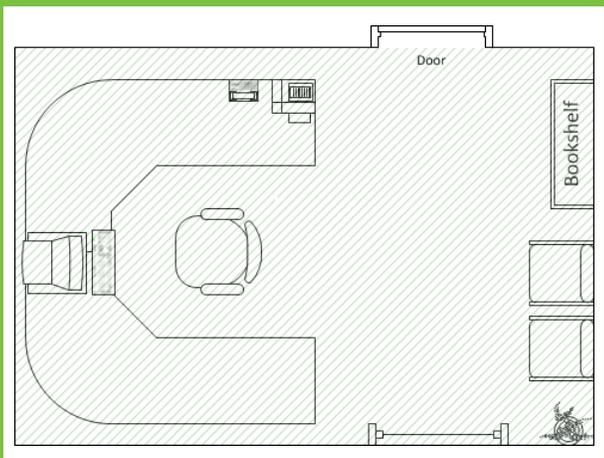
- February
  - 13
  - 14
  - 15
  - 16
  - Through to 28
- March
  - 1
  - 2
  - Through to 12, plus 29-31

At the beginning of each day, take the folder for that day. Review its contents. Handle anything that you can right away, and place remaining items in your priority tray. Place the date folder in the next month. At the end of the day, if there is anything left in your priority tray, re-file it in the incubator. When the month ends, check the main folder for the next month and file any stray items by date.

## GOPHER System



## Best Workspace Layout



# Key Components of an Information Management System

## Calendar

- **Purpose:** Used to keep all appointments and follow-up reminders
- **Paper-based:** One to two pages per day (enough room for appointments and tasks)
- **Electronic:** Should support reminders, color-coding, adding notes, and easy search and sorting options

## Projects Notebook

- **Purpose:** Keep track of project ideas, "someday" items, and other miscellaneous information
- **Paper-based:** Should have tabs from A-Z (example: three-ring binder with index tabs)
- **Electronic:** Should be organized alphabetically (such as a folder with various documents/Microsoft OneNote)

## Communications Log

- **Purpose:** Keep track of voice mails sent and returned and things to mention to people you frequently communicate with.
- Your communications log should have two **areas**:
  - **Voice Mail Log:** One message per sheet. Be sure to include the date and time, person calling, their organization, essence of the message, callback number, and due date. Text messages can also be logged here. If necessary, move completed call sheets to a folder in your archive files. (Make sure they are organized by month.)
  - **Communication Log:** Keep one sheet for each person that you regularly communicate with. Note things to tell them, questions to ask, items to return, etc. The next time that you see that person, grab their sheet and give them the necessary information. Then, toss the current sheet and start a new one.
- **Paper-based:** Should have section for each area, with people organized alphabetically (perhaps with index tabs)
- **Electronic:** Should be organized alphabetically (i.e. a folder with various documents or Microsoft OneNote)

## Tasks Lists

- **Purpose:** Keep track of things that need to be completed.
- Most **e-mail programs** feature the ability to track tasks, monitor completion, and assign reminders. You can also get specific programs to manage tasks.
- Some people keep a **running paper list**. Another option is to start a **fresh list every day**.

## Types of Files

**Active files** are items you access **daily**. (Examples: Directory of phone numbers or e-mail addresses, standard operating procedures, and checklists.)

**Working files** are items you access **weekly** or **monthly**. (Examples: Information for weekly reports or notes for monthly meetings.)

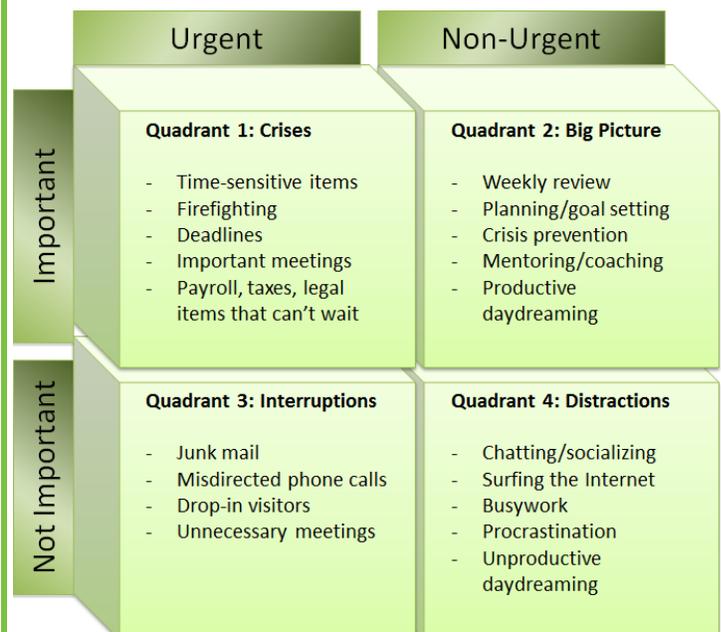
**Reference files** are items you access **yearly**.  
Examples: Previous annual reports or active personnel records.

**Archive files** are items you **do not access on a regular basis** but need to keep for legal or tax reasons.  
Examples: Previous tax records or old personnel files.

### Overall Structure

- Decide on a main repository for the particular type of file.
- Then, set up folders and sub-folders for both your paper and electronic files.
- Folders should be named according to a client, project, or task. Keep naming consistent.

## The Urgent-Important Matrix



Why are there so many different organizational systems and time management methods out there? The answer is simple: it's like any other personal challenge, like weight loss or money management. There is no simple, one size fits all answer. You must build a solution that works for you.

Sign up for a two-day workshop, where we will explore various time management and organizational tools and techniques so that you can build a customized productivity plan for your personal and professional lives. At the end of the course, you will emerge with a plan that works for you, so that you can start regaining control of your life!

**YES! I WANT TO REGAIN CONTROL OF MY LIFE!**