Online Sessions and Workload Coaching

Focus | Plan | Do It ☑

Improve Productivity ... Reduce Stress

Positive People

Contents

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DOING THE RIGHT THINGS

FOCUS

- Values
- Goals
- Roles
- Projects
- Tasks

SETTING UP SYSTEMS

DO IT ☑

| Capture | Clarify | Organise | Reflect | Engage |

DOING THINGS RIGHT

PLAN

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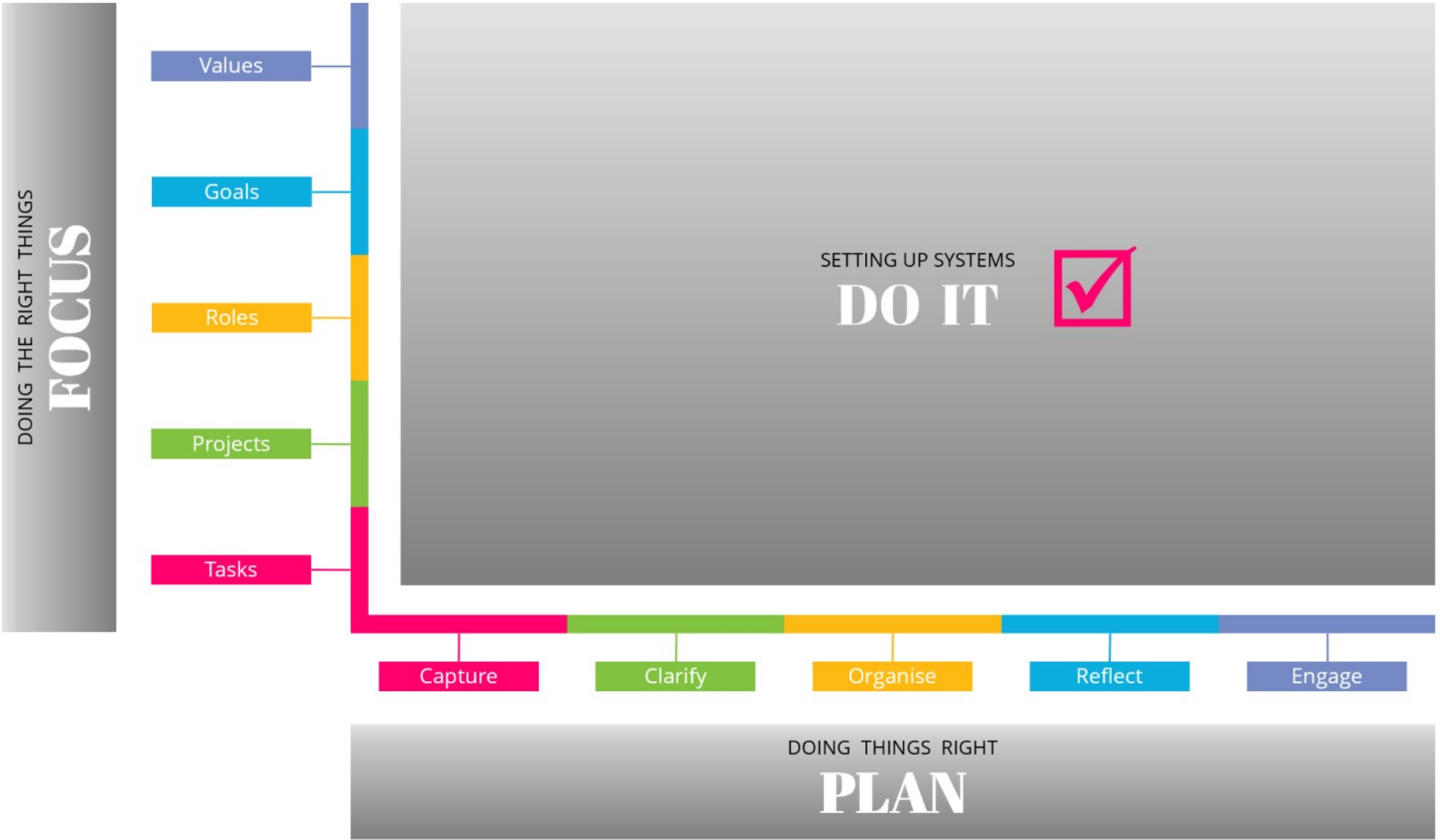
Exploring the things that are important to us

Performance – I am at my best when … I am at my worst when …

Passion – What do I really love to do at work? What do I really love to do in my personal life?

Talents – My natural talents and gifts are: (e.g. music, decision making, being a friend)

Imagination - If I had unlimited time, resources and could not fail I would …

Vision – Imagine your life as an epic journey with you as the hero/heroine of the story. What do you imagine your journey to be about? Complete the following statement by describing what you are doing, who is it for, why you are doing it, and what the journey's results are. My life's journey is …

Character – Imagine it's your 50th wedding anniversary/80th birthday. Who will be there? What tribute statement would you like them to make about your life?

Contribution – What do I consider to be my most important future contribution to the important people in my life?

Conscience – Are there things I really should do or change, even though I may have dismissed these thoughts many times? What are they?

Influence – Imagine you could invite to dinner three people who have influenced you the most—past or present. Write their names in the box below. Then record the one quality or attribute you admire most in these people.

Balance – Think of balance as a state of fulfilment and renewal in each of the four dimensions: physical, spiritual, mental, and social/emotional. What are the single most important things you can do in each of these areas that will have the greatest positive impact on your life and help you achieve a sense of balance? Physical, Spiritual, Mental, Social/Emotional.

Reflect on one or more of the exercises above …

What values does the above exercise emphasize? (e.g. Respect, communication, family)

3-5 year vision and 6-12 month steps to reach the vision

SAMPLES

Genre	3-5 year vision	6-12 month steps
Career		
	On the Senior Management Team	Complete the SQH programme
Finances		
	Children largely self-funding	Support children in university
Fitness		
	Complete a marathon	Complete couch to 5k
Home		
	Moved house	Get the kitchen re-modelled
Travel		
	Own a holiday property in Europe	Spend 2 months in the region

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Map your Areas of Focus (grey boxes) and list key projects (gold boxes)
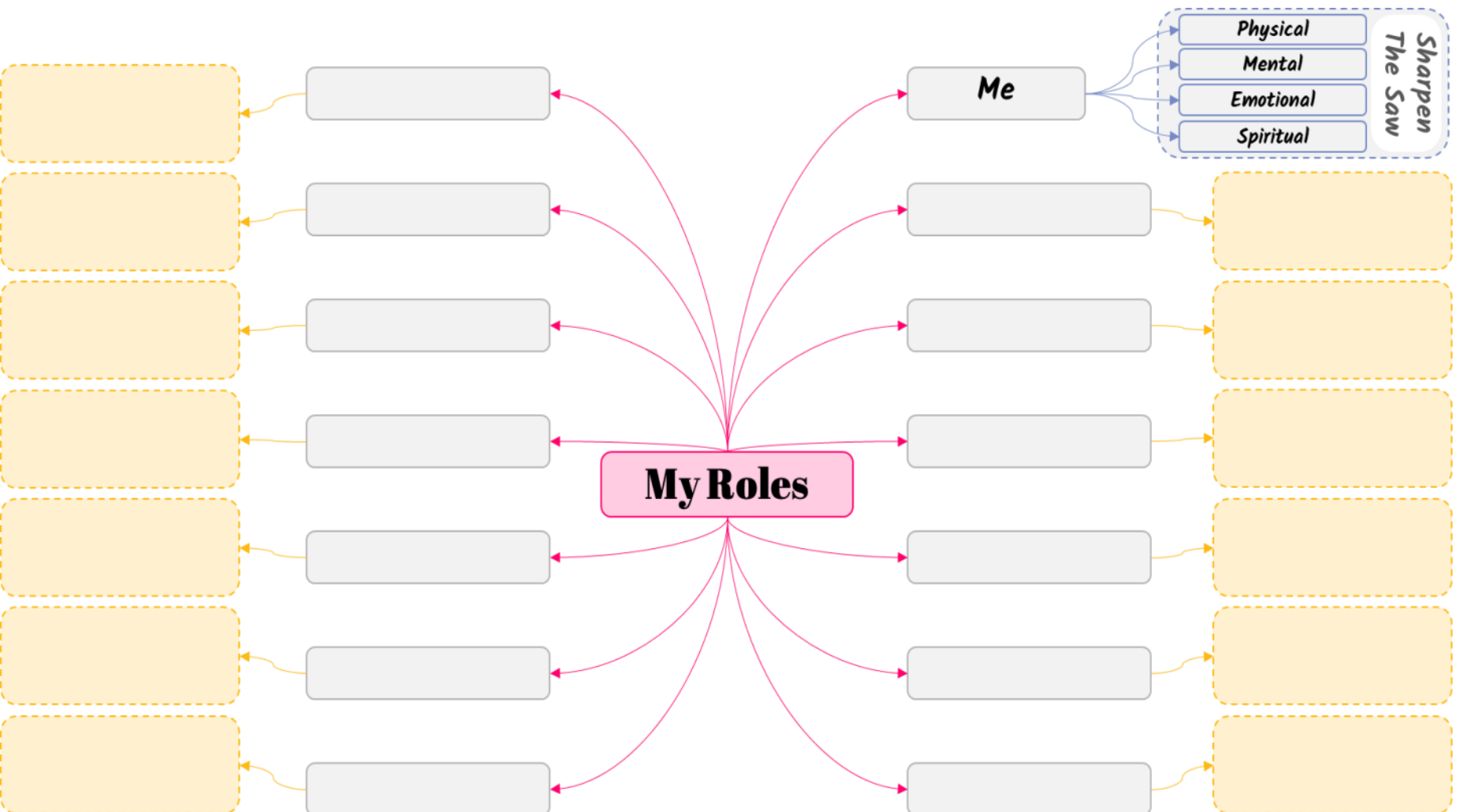
Me

Sharpen The Saw
- Physical
- Mental
- Emotional
- Spiritual

My Roles

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For one role, map out the 'job description'. (Repeat on additional copies as needed)

My Roles →

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For one role, map out the 'job description'. (Repeat on additional copies as needed)

My Roles →

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5) Brainstorm and list physical actions

6) Identify the context

4) What will success look like?
   Why are we doing it?

1) Name of the project

2) Key connected role(s)

3) Due date (optional)

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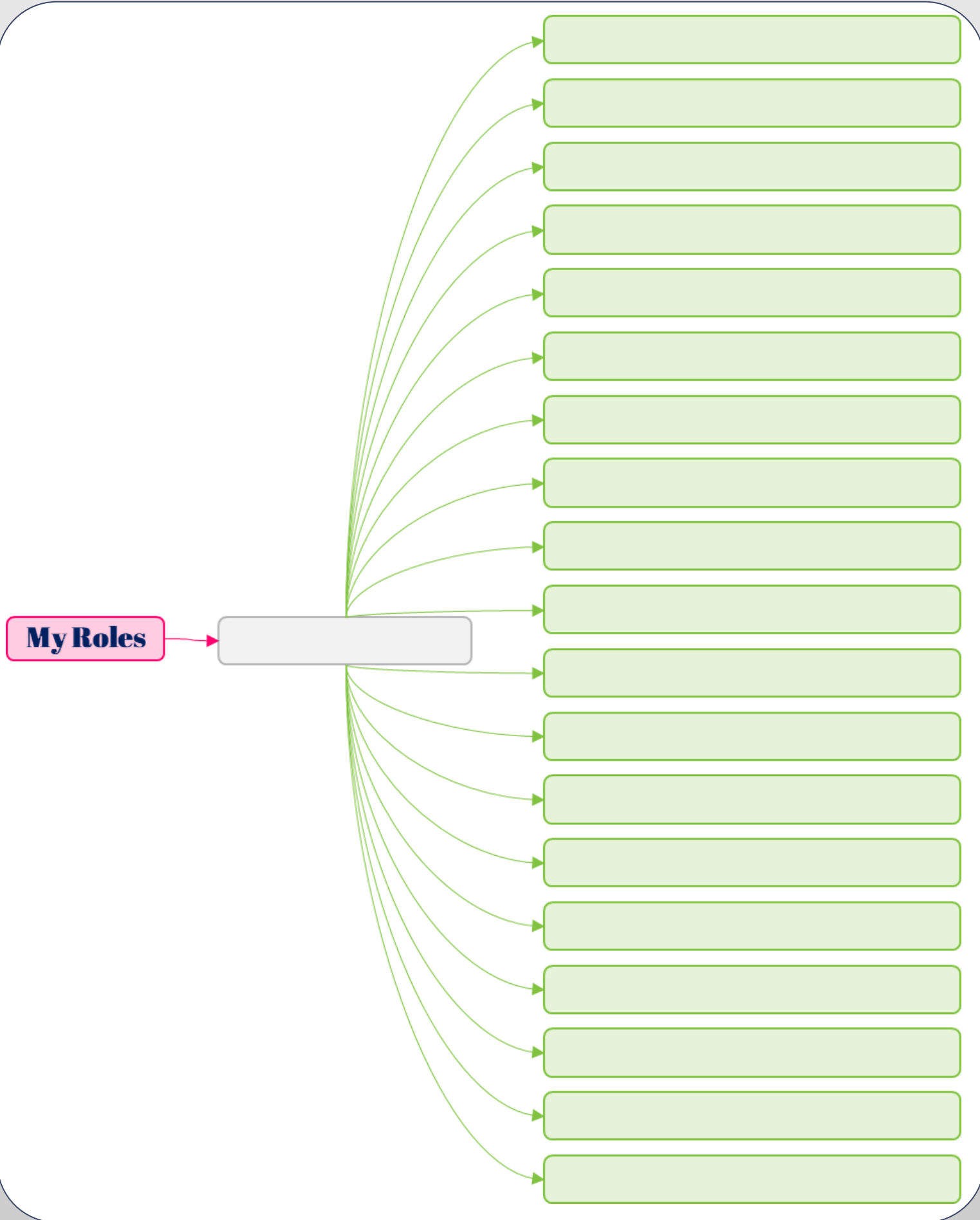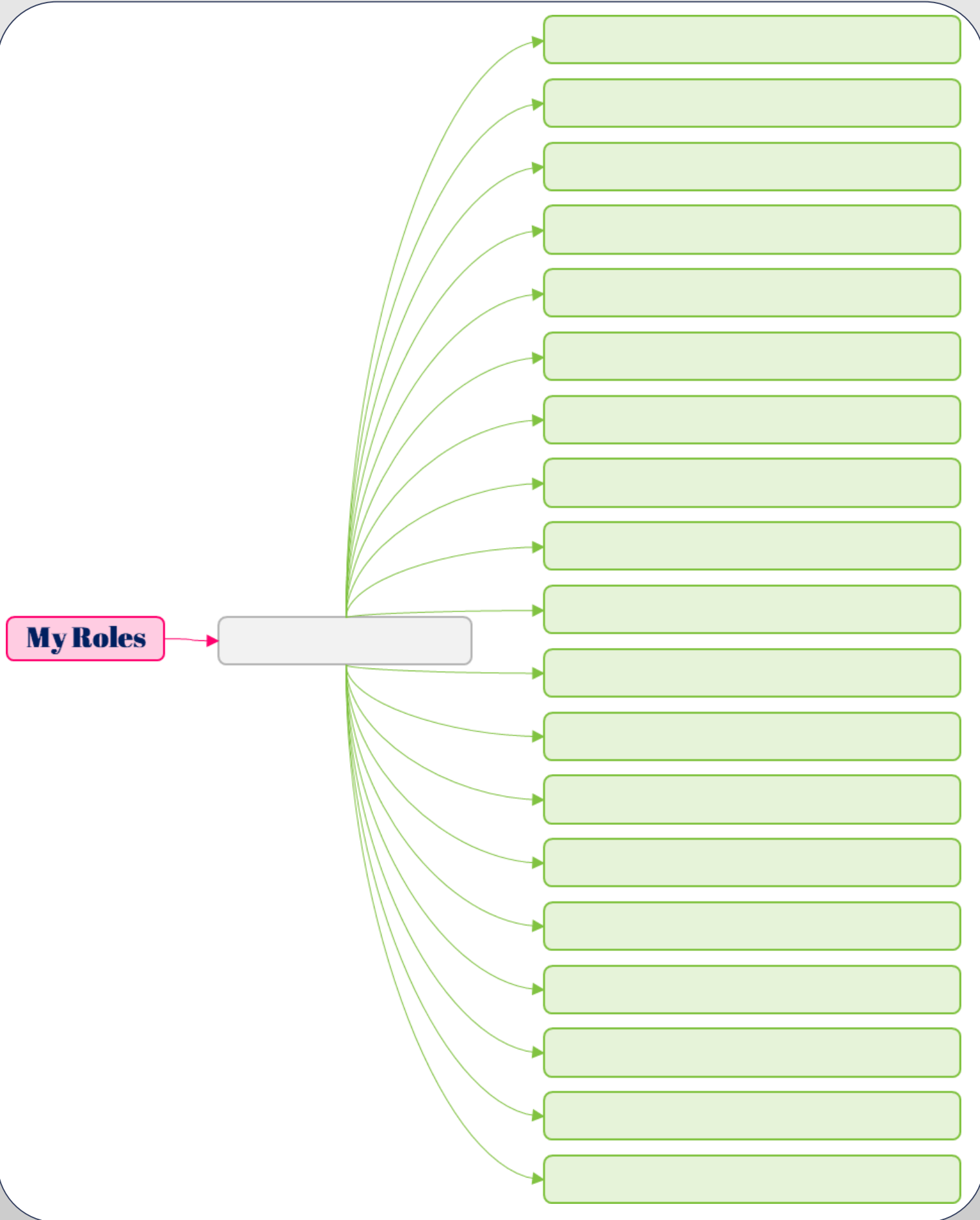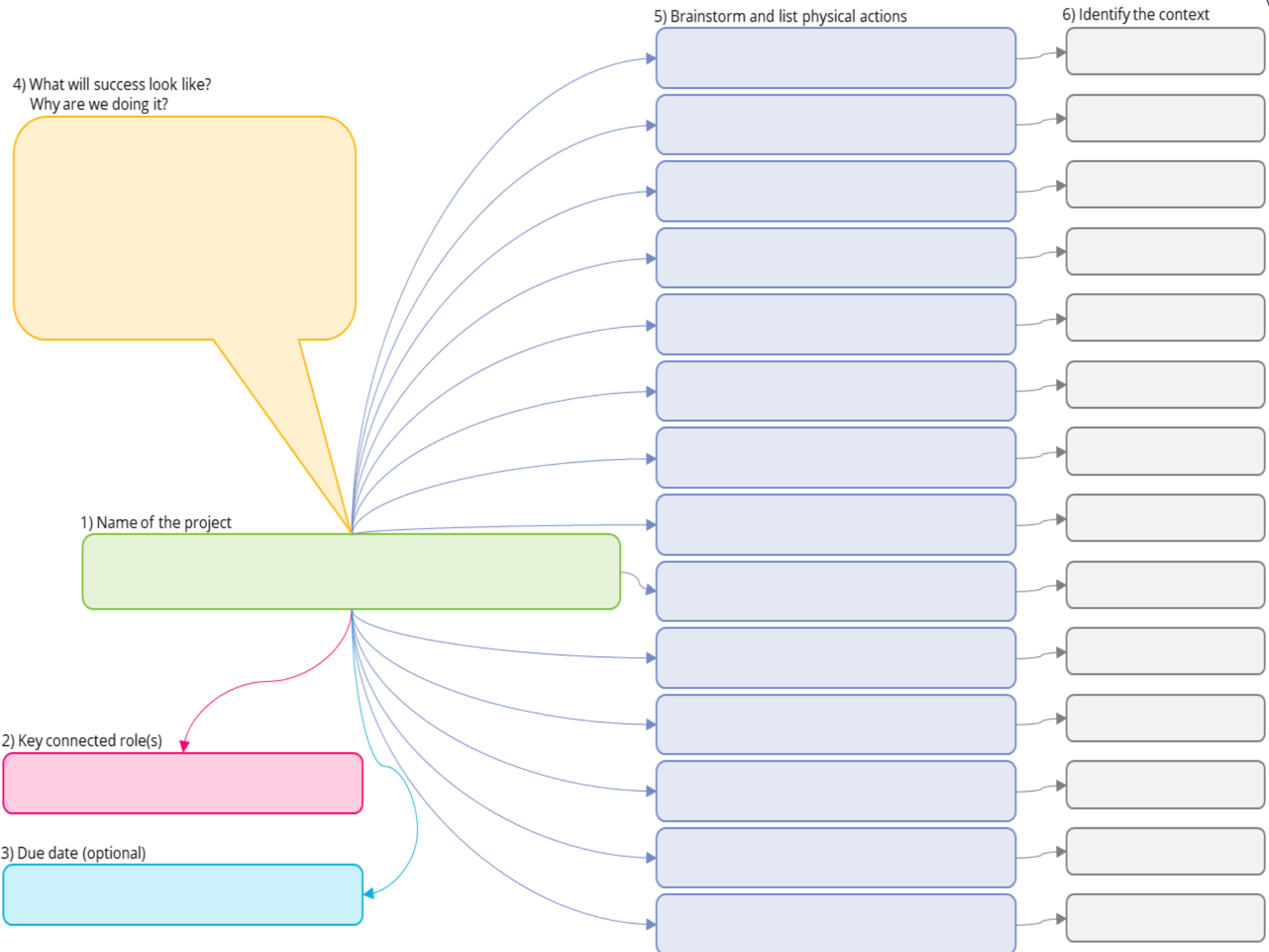
Map your typical week to the Eisenhower Matrix

HIGH

2

Relationship Building
Planning
Self care

Balance, Perspective
Calm productivity

1

Deadlines
Crisis management
Putting out fires

Stress
Burnout

IMPORTANCE

URGENCY | URGENCY

3

Trivia
Binge TV
Scrolling social media

Irresponsibility

4

Some meetings
Over-supporting others
Form filling

Feel victimised
Short term focus

IMPORTANCE

LOW

2	1
3	4

For a few days, analyse your activities. Any adjustments that would help?

Time	Activity	Role	Quadrant and Length			
			1	2	3	4
7:00 PM	SAMPLE - Exercise at Gym	Me		1.5		
6:00 AM						
6:30 AM						
7:00 AM						
7:30 AM						
8:00 AM						
8:30 AM						
9:00 AM						
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10:30 PM						
11:00 PM						
11:30 PM						
12:00 AM		**Totals**				

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Levels of the Focus Framework

Our work and life can be defined by various levels, which give perspective on the actions we take on a day to day basis. Understanding how they affect our choices, will help to bring clarity to the tasks we choose to undertake (and choose to refuse).

If we engage with our priorities from the top down, this can enable us to align our values and purposes determining our vision which in turn helps us create goals and objectives. These goals frame our areas of focus which will generate projects that require to be accomplished to meet these roles and responsibilities. Finally our day to day tasks (the physical actions) are the critical factors in completing our projects.

When these levels are in harmony, we will have perspective for our work and personal life.

1.   Values

Ultimate intention of why we are doing something. The things that are important to us and "make us tick." These will give us the motivation and clarity for our visions and goals.

Review frequency: When additional direction is required, recalibration and alignment of our goals.

2.   Goals

What will success look like? Long term outcomes and ideal scenarios say 3-5 years in the future. What do we need to accomplish in 1-2 years with our board, partners, family or self to make the vision happen?

Review frequency: Whenever clarity and direction or motivation are required. Shorter term goals should be reviewed at least monthly, quarterly, annually and when we need to recalibrate.

3.   Roles

Our areas of focus or responsibilities that we need to maintain on an on-going basis. Review our job description, organisation chart, employee handbooks, family responsibilities, project checklists, etc.

Review frequency: Whenever job or life role is changing, performance reviews and at least on a monthly review basis.

4.   Projects

Outcomes we want to accomplish that require multiple actions. Unlike many of our roles and responsibilities, they have a completion within the next few weeks or months. This will include "sub-projects" that contribute to the bigger projects.

Review frequency: Weekly review, and whenever our next actions need further clarification.

5.   Tasks

Next physical action that we complete towards accomplishing our projects. Includes calendar items and action lists.

Review frequency: Throughout the day, when the question arises, what shall I do now.

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Identify your Capture Tools. Which are your better/worse methods?

|	TICKLER QUESTIONS	YOUR TOOLS	☑/☒
1	In meetings, how do you record notes?		
2	When stopped in the hallway, where do you capture actions?		
3	When your boss sends an email asking for a report, where do you track the task?		
4	You're in the shower and remember the car tax is due. How do you handle it?		
5	You're asked to do something via MS Teams chat. How do you ensure you don't 'drop the ball'?		
6	Where do you put business cards you receive when you're out?		
7	You see you need milk, where do you write that you need to buy some?		
8	While you're travelling where do you record great ideas?		
9	Where do you put dry cleaning receipts after dropping off the laundry?		
10	If you receive an action during a mobile phone call, how do you record it?		
11	You hear about a concert on the car radio, how do you remember to buy tickets?		
12	How many notepads do you have?		
13	Where do you put a telephone message for a family member who is out?		
14	Where do you put receipts for business expenses?		
15	Where do you put the letters you receive?		
16	Where do you make a note that the roof needs fixing?		
17	Where do you store theatre tickets for a concert in 3 months' time?		
18	How do you remember your children's parties?		
19	How many email inboxes, voicemail boxes and calendars do you have?		
20	Where do you put a voucher for a free car wash?		
21	OTHER SCENARIOS		

Identifying the meaning of our captured items

List as many "next action" verbs as you can (e.g. speak to, email, buy, etc.)
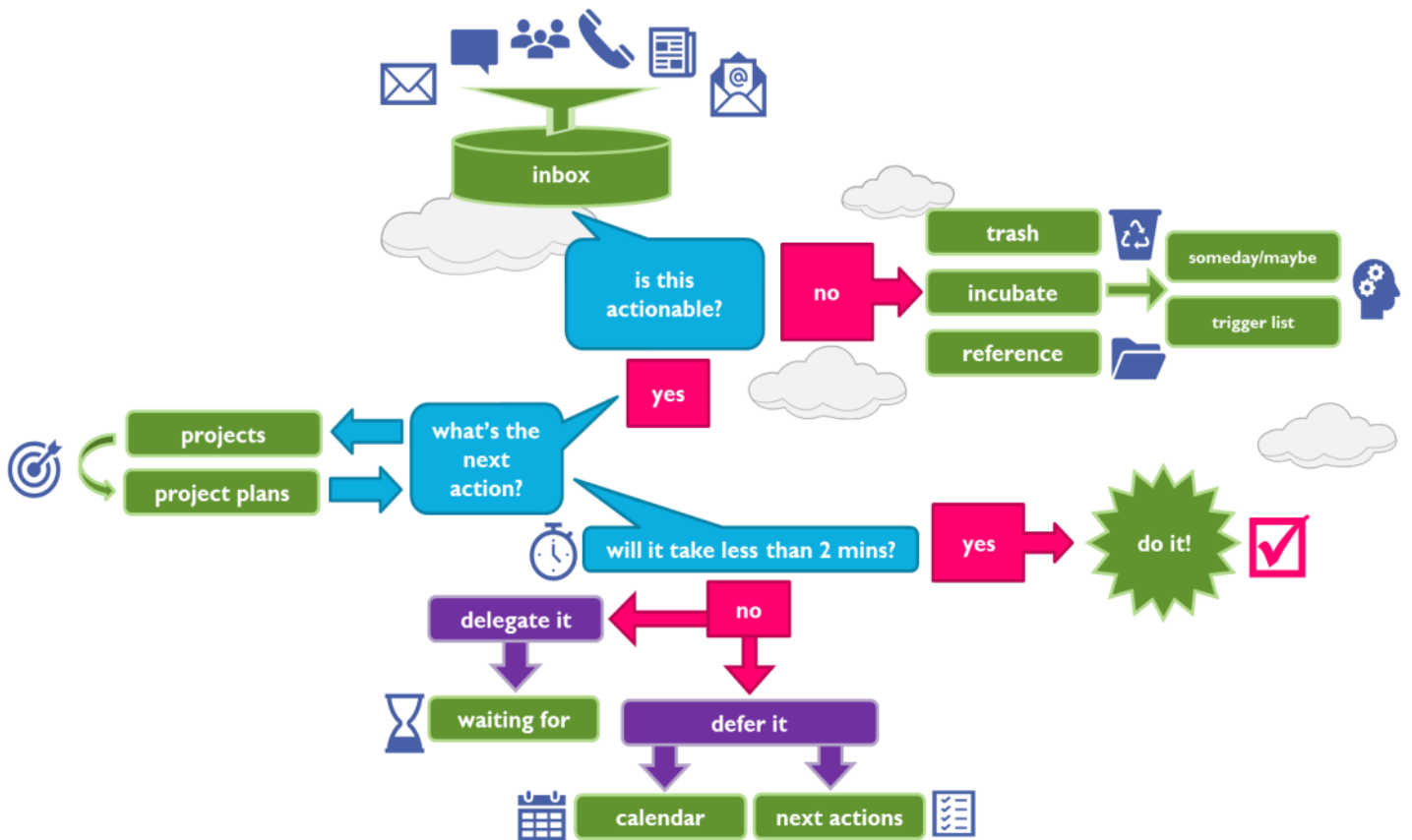
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Respect your calendar; organise your tasks by context.

Start simple

Use only a few contexts at first and add extra ones as needed. Don't feel you have to use the sample contexts.

Choose contexts that match your own lifestyle and working environment.

You may split contexts, e.g.:

Agenda—Boss
Agenda—Team
Agenda—PA
Agenda—Job share

You might also join some contexts together—e.g. @Phone, @Office, @Computer might all be simply listed as "Actions".

Hint: Everyone probably needs a "Waiting For" for work and home life.

Identify your contexts

Work	Personal
Waiting For	Waiting For

SAMPLES

WORK SYSTEM

Waiting For
Agenda – Boss
Agenda – Team
Desk – Calls/Email
PC – Creative Writing
iPad
Headspace
Braindead
Projects

PERSONAL SYSTEM

@Waiting For
@Supermarket
@Garden Centre
@Home
@Calls/Emails
@Boat

CALENDAR VS. TASK LIST

Like the task lists, the calendar is just another list of commitments (date and time specific sorted chronologically).

Respect your calendar; place items on this list that must be done on a specific day and/or at a specific time.

This includes meetings, appointments and events. This is the hard landscape of your day and week.

Should you use your calendar for tasks?

There is a strong benefit to putting *some* tasks onto your calendar; it raises awareness and commitment of these actions.

However, putting all tasks on the calendar, because it's the only part of our system that we trust, will lead to double-booking and continual re-scheduling. Instead, build trust in your task system by checking it frequently.

CONTEXTS VS. PROJECTS

Some ask whether they should filter, group and sort their tasks by context **or** by project.

Ideally, both! There are plenty of tools that will allow you to categorise a task by both its context and the project it relates to.

That way, when you want to focus on a project, you can see all the relevant tasks. Equally, when you go in for a meeting with your boss, you can see all things you want to discuss, even if they are across multiple projects.
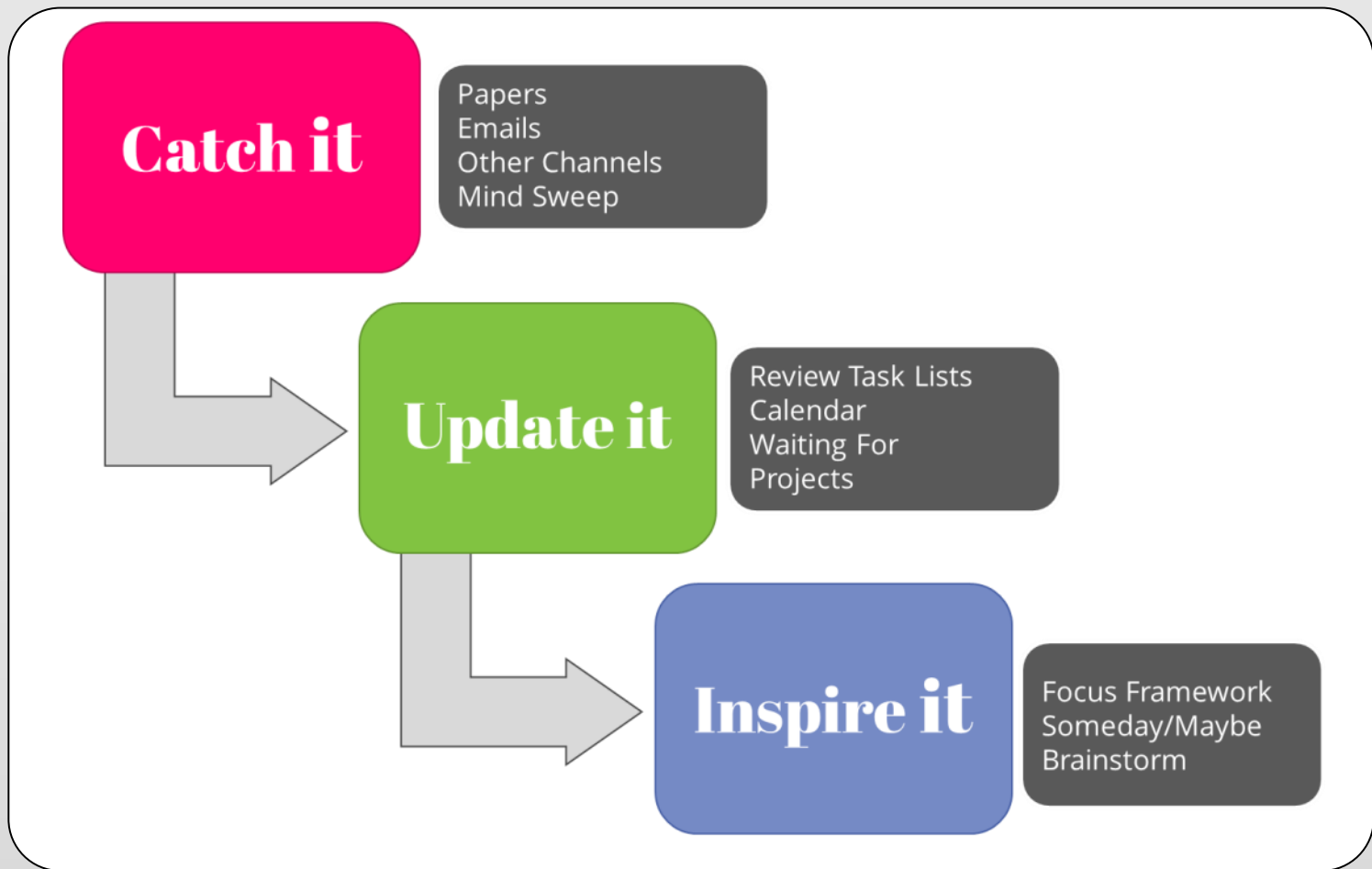
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Catch it — Papers, Emails, Other Channels, Mind Sweep

Update it — Review Task Lists, Calendar, Waiting For, Projects

Inspire it — Focus Framework, Someday/Maybe, Brainstorm

CATCH IT

Collect all loose papers and materials including receipts, letters and meeting notes.

Ensure all **input is processed** (not "done" but you have clarified your thinking for paper materials, emails, voicemails, etc.) Do a **mind sweep** of any other un-captured new inputs including projects, next actions and waiting fors. Put them in writing and get them out of your head.

UPDATE IT

Review **action lists**, ensuring completed items are marked off.

Add new actions that may have arisen from completed actions.

Review **past calendar** since your last review, capturing any action items that may have arisen from meetings, appointments, etc. Review **future calendar** (an in-depth review of next couple of weeks and a scan of next few months).

Review **waiting for list** to see if you need to follow up with any of your contacts. Mark off completed waiting fors.

Review **projects** ensuring you have at least one next action item on each.

Browse **project plans** and **reference material** to trigger new actions.

GET CREATIVE

Review levels in Focus framework to stimulate new ideas and brainstorm thoughts to add to your system.

Review **someday/maybe** list to see if any of these have now or should become current projects.

Let your mind explore.

DATE/TIME OF YOUR WEEKLY REVIEW:

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CONTEXT

Where do you need to be to do your tasks?

What do you need to have around?

Phone, Office, Computer, Agenda, Home, Shops.

This is the key limiting factor—it doesn't matter how important that email is, if you aren't at the computer, you can't do it. Don't be reminded of things you can't do.

Which are your <u>key</u> contexts?

TIME

Although you can 'chunk' your jobs into smaller pieces, don't start a task that will require a lot of uninterrupted time, when you only have 15 minutes before your next meeting.

Try to find a longer gap in your schedule to allow you to work on a bigger task. **Hint:** We usually underestimate how long our tasks will take.

Which current task needs more than an hour?

ENERGY

Don't tackle tasks that need you to be in peak performance when you aren't feeling at your best.

Equally, save routine, low-energy tasks for that low point in the day or week.

Match the task with the energy level.

When is your energy high?

When is your energy low?

PRIORITY

Priority is made up from the IV Quadrants exercise and based on two factors, urgency and importance.

Importance is determined from upper levels of the Focus Framework (Values/Goals).

What is highest priority now?
What are your 'Big 3' for today?
1)
2)
3)

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Getting to Grips with the Five Phases of Workflow

1. CAPTURE

Collect and catch anything on your mind and put them in placeholders you trust. Get them out of short term memory.
> Use inboxes, phones, notebooks, in-trays, etc.
> Have as many as you need but few enough that you are able to manage.
> Trust them by emptying them regularly.

2. CLARIFY

Process these items by clarifying their meaning (decide what each item means.)
Ask "is there a next action?" for each item.
> If not actionable, delete it, add it to someday/maybe or keep it for reference.
> If it is actionable, what is the next action?
>> Do the next action (2 minute rule),
>> Delegate it (add it to "waiting for" list) or
>> Defer (put it on an action list or calendar).

If there are multiple actions, then there is a "project" and you will want to create an area to map the project and its plans.

3. ORGANISE

Group results of stage 2 and put them into a system that can be reviewed and retrieved when necessary.   This includes the calendar and a categorised next action list.

Categories would include:
> Projects
> Next Actions
> Someday/Maybe
> Waiting For

Use contexts to filter live action lists (e.g. Errands, Agendas, Home, Calls, etc.)
Add lists of other levels (roles, goals, etc)
Keep filing system for reference material.

4. REFLECT

Review calendar and action lists daily or whenever you need to recalibrate.
Conduct a customised weekly review to get clean, current and creative.
Review other levels (projects, roles, goals and values) as often as is required to keep you on track.

5. ENGAGE

Make choices about what to do based on 4 criteria:
> What context are you in (at the office, shops, etc)?
> How much energy do you have?
> How much time do you have?
> What is the priority (Priority is based on urgency and importance—see IV Quadrants)?

Stay flexible and trust your decisions by keeping your system clean and current.

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Putting it all into practice

How will what I have learned have an impact in:

3 - 5 years	OR	2 months

What do I need to be doing to accomplish the above in:

2 weeks from now	OR	in the next 2 days

What do I need to do in the next **2 minutes?**