A Pattern Language for Productivity

by Andre Kibbe April 2008
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Pattern #1: Outcome and Action

During the month of April I'm going to publish a series of posts of individual best practices for streamlining workflow. I'll refer to these practices as "patterns," an allusion to Christopher Alexander's seminal book, A Pattern Language.

Alexander's book weaved a rubric of 253 timeless, almost anthropological principles for architectural, urban and community design, in which each of its named and numbered patterns could be implemented individually or in combination with others. An example would be a pattern like Six-Foot Balcony, in which Alexander observed that balconies less than six feet deep went unused, aside from hanging plants. People would not occupy them, since the space was inadequate to install a table and chairs.

Alexander referred to the rubric — the collection of patterns — as a pattern language. Later, the concept was adapted to software engineering by Erich Gamma in his book Design Patterns. The practice of pattern classification spread to other disciplines, from web design to political activism. I'm adapting it to productivity here in order to separate more fundamental issues of methodology from the details of implementation. A term like "lifehack" risks conflating fundementals, like project lists, with particular solutions, like Remember the Milk.

The first pattern in this series, and many of the ones that will follow, are drawn from the everblogged Getting Things Done (GTD) methodology. Because so many posts on Tools for Thought make reference to GTD, I'll be writing my own review of David Allen's Getting Things Done later in the month. While it's true that the internet is saturated with GTD discourse, I'll review it here to provide my outlook on the book and the system for readers to compare and contrast with that of other pundits and bloggers.

Pattern #1: Outcome and Action

Issues, concerns, intentions, ideas and ambitions tend to weigh on the mind in an abstract way. We need a way to think about them more concretely. An item that consumes our attention is an open loop in GTD parlance. It has our attention because we still need to define precisely what successful outcome is needed to realize or resolve it — what will bring the open loop to closure.

Write down one or more issues that are currently on your mind. They might be things like, "I need to submit my application to Stanford," "I still need to arrange our vacation to Bora Bora this year," or "My bookshelf stereo is broken." For each of these items, ask yourself the following question: **What is the successful outcome?** Exactly what result would have to happen in order for you to feel as though you could confidently mark it as done?

Notice that successful outcomes are implicit in many of the items. Some are even explicit. "Submit application to Stanford" is an explicit answer to What is the successful outcome? On the other hand, "My bookshelf stereo is broken" is a good example of an open loop whose outcome clearly needs to be defined. If the stereo has been idle for the last seven months, and you haven't missed it, the successful outcome might be "Discard bookshelf stereo." You may decide that you'd like a newer stereo, in which case the successful outcome might be "Replace bookshelf stereo." **The first goal with each open loop is to process it into a successful outcome.**

Now take each of your successful outcomes, one at a time, and ask: **What is the next action?** A next action is the very next physical, visible action step needed to achieve the outcome. As a technical term in GTD, a Next Action (NA) sometimes coincides with the types of tasks that most people would put on a To Do list. But not necessarily, since the criteria for next actions are physical and visible, not abstractions.

Tasks like "Download application from Standford.edu," "List 'Bookshelf stereo, needs repair' on Freecycle," or "Submit vacation request to HR" qualify as bona fide next actions. On the other hand, an item like "Submit application to Stanford" is not a next action — unless the application has already been downloaded and filled out. Similarly, "Write research paper" would not be a next action prior to having done the research. **Next actions have no dependencies**. They are only those tasks that can be executed immediately, since the actions or resources required to perform the tasks have already been fulfilled. If they haven't, there's a good chance that the preliminary step is what you should be writing down is the next action, such as "Call Oakville High to request transcript."

In GTD, **any outcome that requires more than one action step to accomplish is called a "Project."** Projects can range from very simple outcomes, like purchasing a book, to complex outcomes, like building a bridge. The common denominator is that they require more than one action step. Keeping these projects listed separately from next actions allows the projects to remain identified as open loops when their respective next actions have been completed. If I call to request a transcript, then cross that off of my NA list, the separate project heading, "Submit application to Stanford" remains as an open item, compelling me to either define another next action, or recognize that any subsequent action to move the project forward will depend on receipt of the transcript. Dependencies like the latter are called "Waiting For" items, which are often as important to track as next actions.

To recap, the fundamental thought process for getting things off your mind consists of two questions that need to be asked and answered for each item:

- What is the successful outcome?
- What is the next action?

Pattern #2: A Place for Everything

Being neat is different from being organized. Neatness is measured by how well conspicuous disarray is minimized. Organization is measured by how well storage and retrieval decisions are minimized. Standardize as many common decisions as possible. A library is a functional tool because society has agreed on a specific classification system for arranging books. Piles of books arranged in an arbitrary fashion would be useless.

It's certainly possible to make a fetish out of organizing, as critics have long pointed out. Imposing order on a world of entropy can easily become of full time occupation. **But organization is ultimately concerned with arranging our environment for a purpose**. We only need to decide where to put things until the decisions become automatic, allowing us to focus our attention on higher priorities. Without a higher purpose, organizing becomes an end in itself.

A few examples:

- Where should the PDF you've downloaded and just finished reading go? Having a My Documents\PDFs folder defined for all documents of that type eliminates the need to make that decision in the future. It also makes it knowing where to find it a cinch.
- Which computer has that Word document? Maybe it's best to keep all documents on your laptop, and avoid using your desktop PC for storing critical files.
- How many half-finished bottled waters are in your car and house? Installing a water filter and purchasing a reusable polycarbonate or stainless steel bottle is one approach to prevent plastic bottles from "reproducing."
- What are each of those stray, unconnected cables for? Spend half an hour identifying the target device for each cable (e.g. the charger for the Bluetooth headset). Coil each one in a Ziplock bag, labelling each bag with the cable's function. Then put all of the bags in a transparent plastic box.
- Where should you look in your laptop bag for the papers that come into your life while in the go — receipts, flyers, business cards? Having a single folder labelled "In" can stop the spread of incoming stuff. You can add its contents to your home intray, or process them in transit during down time.

Some patterns to be discussed in later posts — general reference files, tickler file, activity zones — will go into more detail on specific placement strategies. In the meantime, at a look around your environment and look for any piles that represent improvement opportunites. The goal is not to hide clutter, but to prevent its accumulation in the first place. Get off of mailing lists, refuse unneeded bags at retail stores, reconsider whether or not an imminent purchase is necessary or merely impulse. Whatever survives this pruning, ask yourself, "Where should this item go?" Eliminate the unessential, and assign a permanent home to the essential.

Pattern #3: Checklists

Checklists are mental inventories made physical. Instead of trying to hold your thoughts on a topic entirely in your head, write them down as a list. Experiment with making checklists for anything and everything that has your attention.

Having a list to review reduces the need to rethink what you need to consider about a topic. Since short-term memory limits the number of items that someone can think about simultaneously, checklists provide a simple structure for spreading things out for reviewing in parallel (see Distributed Cognition).

For instance, a travel checklist would include all of the items you need to take with you on a trip:

- Ticket
- Boarding pass
- Dress suit
- 2 casual shirts
- 2 casual pants
- Toiletries
- Etc…

For blogging, I brainstormed a checklist of future articles to write. I also have checklists of technical issues to resolve, design modifications, and themes I want to explore. When the time comes to write, it's much easier to review the article checklist than to think about a new topic from scratch. Since I have over two dozen article ideas to choose from (twice that if I include the "Pattern Language" series), I don't have to worry about drawing a blank; I just point and shoot.

Checklists are a great way of seeding the mind for further thinking on a topic. Each item on a checklist can germinate a checklist of its own. We can extend our thinking on "Toiletries" from the previous checklist as an example:

- Toiletries to take
- Airport restrictions
- What's already available for free in the hotel room
- Drugstores and markets near hotel
- Commercial toiletry kits

The first checklist was meant to be an inventory of what to bring. Prior to leaving, you step through the list to make sure every item is accounted for. The second checklist is a list of considerations: we spell out all options, then review them to see which ones are practical or actionable. One option is to buy a toiletry kit that bundles everything in a compact case, making it unnecessary to think about purchasing more items near the hotel (it's easy to forget that we're often too tired after a flight to run errands).

You can spend five minutes creating a checklist of checklists that would be useful to make during windows of free time:

- Article ideas
- Career goals
- Family goals
- Investment opportunities to research
- DVDs to buy
- Library books to check out
- Gifts to buy
- Home improvements
- Activities to best use leisure time
- Not To Do (i.e. time wasters)

Checklists are a great way to avoid reacting to problems in a knee-jerk fashion. Take a minute to stop, list out all issues and concerns related to the problem, and the ways to recover from the worst-case scenarios — you can even write out "problems" and "solutions" as separate checklists. But the most important step is to get things out of your head, where they loom out of scope. Writing anything down immediately makes it finite, observable, and potentially actionable.

Pattern #4: Collection

Keeping thoughts exclusively in the mind allows them to fester and die. **As soon as a potentially significant thought enters your mind, write it down.** Build in the habit of collection: the act of spontaneously recording anything that has your attention. The faster new ideas are written down, the faster newer ideas will emerge in their place. Collection frees up working memory to allow new information to come in.

It also enhances focus by diverting distractions. When you're working on something, and a new thought that's not related to your work emerges, at some level your mind has to struggle between focusing on your either your main work or the new thought. Writing the new thought down allows you to let it go.

I keep a notepad next to my laptop at all times. Whenever a thought enters my head that's unrelated to the work I'm doing on the computer, I write it down on the notepad, which acts as a mental sidebar. I could keep an open document on the laptop and switch to it when I need to write something down, but I find that switching away from my primary document breaks my focus in a way that keeping a notepad to the side does not.

If you're already using a ruled notepad to take notes or draft something, and an unrelated thought occurs to you, you can create a "sidebar" one-third of the way in from the right edge with a downstroke spanning 10 lines, or whatever number is suitable, making a second margin. Some stationery providers make meeting note worksheets with explicit sidebars for secondary notes.

Many people know to write things down, but they try to evaluate their significance before deciding if they're really worth writing down. That puts the cart before the horse, since people are often not in a context where they can devote the attention necessary to assess the their significance. For our purposes, **if it has even potential significance, it's worth writing down**. A silly idea might not be so silly after all once it's been thought through. An idea that can't be acted on now might be actionable later, when circumstances change. An idea might need a few more minutes of research than you have to spare at the moment.

Collection tools need to be ubiquitous to be effective. It should be as easy to capture a new idea walking down the street as it is sitting at a desk. If you don't already have a ubiquitous capture tool on hand, experiment with different solutions according to your preferences:

- A pocket-sized spiral notebook
- A voice recorder
- A Moleskine
- A folded sheet of paper
- A cell phone, leaving a voice mail or a text message to yourself
- Index cards
- A Notetaker wallet
- A PDA or smartphone

All of these have their advantages and disadvantages. It's almost always faster to capture with pen and paper than with electronic devices, but they require double entry if the notes are ultimately going into an electronic tool like Google Calendar. PDAs and smartphones have the benefit of synchronizing with certain Personal Information Managers (PIMs — e.g. Outlook, iCal, Palm Desktop), automating the data transfer, but capturing the information initially is often less fluid than writing it by hand. Evaluate factors like ease of use, ease of information transfer, weight, bulk, aesthetics and cost.

Pattern #5: Processing

Some things that have our attention come from the outside world. The phone rings, and we discover that a great home just went on the market. Other things that have our attention come from within. Perhaps it's time to look into going back to school as a grad student. In both cases, determining whether or not these opportunities are worth pursuing, and if so, what course of action is required to pursue them, requires processing.

Processing invokes Pattern #1, Outcome and Action, by taking each internal or external input, deciding what it means, and what should be done with it. Processing an intray involves taking each paper from the tray, one at a time, and applying a decision tree that begins with the following questions to ask and answwer:

- What is this?
- Is with actionable?

If the answer is yes:

- What is the successful outcome?
- What is the next action?

The next action gets put on a Next Actions list. If the successful outcome requires more than one action step to acheive it, the outcome is entered on a **Project List**. Since most outcomes require more than one action, at least two lists will need to be maintained: a Project list and a Next Action list (or just "Action list"). Optionally, next actions can be organized into a pattern to be introduced later, called Context Lists, in which each list represents the physical context required to take the action: a separate action list for all next actions requiring a computer, another list for actions that require being at home, and so on.

If the answer to "Is this actionable?" is no, we ask:

- Do I need to keep this?

If the answer is no, we toss it in the trash. If the answer is yes, we ask:

- Will this be actionable later, or is this reference?

If the item will be actionable at a later date, like an invoice, you two options. You can enter the actionable date on your calendar and file the original paper in your General Reference Filing system if it still needs to be kept to support the action. You can also defer the action by filing the paper in a Tickler File, a special set of folders organized by the date on which their contents will be processed. Both filing systems are patterns that will be covered later in this series.

If the item is not actionable, but may be of use later, create a file for it within your A-Z general refence files.

This decision tree gets applied to every single item in your intray, one item at a time, until you get to "zero base": an empty intray. This assumes, of course, that every potentially actionable piece of paper in your environment has been properly collected into your intray in the first place. Ideally, the only paperwork on your desk (aside from the intray) is for the one project you're actively working on at the moment. If you're not working on it, the inactive paperwork should have been either filed or discarded after processing. A workspace thus organized firewalls your attention to keep your focus on the one thing you're currently working on.

Processing also applies to all items in your internal environment. In the example of considering going to grad school, we decide in this case that we're not yet committed to going back to school, but that we are committed to getting enough information about the graduate program to make a decision. This type of research objective is called a process project, which usually gets entered on a project list as Look into X, or R&D X.

The object of process projects is not open-ended information gathering, but to research an option just enough to make a decision on it. In this case, we want to get enough information to decide whether or not we want to commit to enrolling in graduate school. Since research is an actionable item, we decide what the next action is: in this case, we put, Google "Best graduate programs in Biology," on our next actions list. Since this is only the very next action in our research, and others will follow, we put R&D Biology Masters degrees onto our project list. This clarifies our immediate goal, and the very next action step necessary to acheive it.

Internally generated items that require processing must first be externalized though a mind sweep, a list of everything that's on you mind: errands to run, people to call, travel plans to make, and so on. You keep listing items until there's nothing further to put down — until your head is empty. Once you have the list in front of you, each item on the list gets processed one at a time and crossed off. Once every item is crossed off, you should have and outcome and action corresponding to each item if that's actionable. If you've decided that an item is not actionable, there's nothing further to do beyond crossing it off.

If the item is something you'd like to consider to later action, like Vacation in Rome, put it on a separate list called "Someday/Maybe," which is similar to the project list, except that Someday/Maybe only contains items that you've decided are not active projects.

Ultimately, processing to zero base takes every new item — physical or mental — that enters your world, and parks it somewhere in your external, trusted system.

Pattern #6: General Reference Files

One of the main obstacles to decluttering is the lack of a designated area, other than the wastebasket, to move clutter to. The main difference between a library and a pile of books is that the library imposes order on disorder, making the collection a functional system. The same principle can be applied to virtually any pile or scatter of papers in a home or office. **The antidote to paper clutter is an simple A-to-Z general reference filing system**. As the saying goes, "File, don't pile."

General reference files hold all the paperwork in your environment that you've collected and processed. Is that piece of paper on the kitchen counter trash, or is it worth keeping? Is it something that requires an action, or is it something that just needs to be saved for reference? If the answer to these questions are the latter in both cases, the paper either gets put in an existing file, or we create a new file for it — even if it's only a single piece of paper. **If it's worth keeping, it's worth filing**.

As the name implies, general reference files are not intended to store specialized records, like bookkeeping, that require whole filing cabinets to themselves. The A-to-Z system creates a set a placeholders for new paperwork, though there's nothing that actually prevents using the same system for bookkeeping; it's just a matter of having enough cabinet space for all of the files.

Four drawers are the norm of most individuals' home and office needs, though I've pared my files down to fit in a single two-draw file cabinet. The top drawer holds my tickler file in the front, and my supply of blank folders and hangers in the back. The bottom drawer holds my A-to-Z files. **Try to keep the drawers under three-quarters full**. Once you anticipate having to stuff a new file in with effort, you'll start to unconsciously resist making the file in the first place.

Invest in a good file cabinet, one where the drawers roll in and out smoothly without much friction. For a year I tried to cut corners by using a plastic file cabinet at home that looked nice, but had drawers that became hard to pull out once the weight of additional files began to bear down on them. The usability contrast between the my home file cabinet and my metal office file cabinet (which rolled in and out smoothly) made it obvious that plastic file cabinets were a false economy. It's more frugal in the long run the best file cabinet you can afford.

In GTD, the recommended practice **use a typeset labeler for creating files**. While this does make labelling a little slower, the increased legibility that results from having a drawer of typeset-labelled files make retrieval much faster. **Keep the labeler on or in your desk at all times, and always have a supply of blank file folders on hand** (I recommend third-cut). Having these readily available helps minimize the resistance to creating new files by eliminating the need to search for their components. **Creating a new file should take less than 60 seconds, otherwise the practice is likely to taper off as an ongoing habit**.

Another practice in GTD canon is to **use hangerless files**. Hanging file systems like Pendaflex add unnecessary overhead to filing, unless the file cabinet being used lacks a follower block (the adjustable backstop that keeps the files upright). If a hanging file system is already in place and cannot be modified due to company policy, or because the cabinet lacks a follower, a good strategy is to assign one file per hanger, and label the folder itself instead of attaching the plastic labelling tab to the hanger. If you have an empty drawer to spare, it's a good idea to use it for storing your blank folders — and if necessary, your empty hangers.

Pattern #7: Activity Zones

Designating a place for everything is necessary for good organization, but not sufficient. Things need to be accessible where they will actually be used, not just where they "should" be used. Organize resources around your activity zones.

If someone frequently reads in a living room chair facing a television, it's not practical to keep the library 15 feet away. At the least, it would make sense to install a satellite bookshelf a couple of feet away from the chair, where the person's current reading can be accessed by simply leaning over rather than having to get up from the chair and walk.

To better organize tools and resources, pay closer attention to your actual usage patterns than to formal or conventional placement strategies. Ask yourself, "Would I be willing to put this back here if I were tired or lazy?" If the answer is no, consider moving its repository or workspace to accommodate real life.

The best place to store something is as close as possible to where you'll actually use it. A general reference filing cabinet is best placed within swivel distance of your desk — not swivel-and-roll. If you typically open your mail in the kitchen instead of your work desk, consider installing an intray on the kitchen counter and process your mail there. You can use a plastic folder labelled "To Desk" for any documents you've processed that need to be carried over to your work desk for filing.

Sometimes it's worth spending the extra money to buy duplicates of things you use in two places. When I was an architecture student, I often found myself getting assignments that required access to my drawing and model-building tools, and carrying my toolkit from home to campus and back was labor-intensive. So I just bought another set of the same tools, and kept one set at home, and one set on campus — then I could start work immediately after getting an assignment, and not have to wait until I got home.

Easy access is critical for friction free workflow. Don't rely on an organizational scheme that requires exceptional disciple. Work hard at designing systems that allow you to be lazy, and you'll become more enjoyably productive.

Pattern #8: Typing Speed

For most of us these days, the computer is the hub of our production, research, entertainment and even socializing. One of the most critical keys to computer fluency — more than word processing, spreadsheet manipulation or even web browsing — is increasing typing speed.

The keyboard is the primary interface on all desktop computers and most applications, so training the fingers to know their way around it autonomically build helps build confidence and competence in just about anything that needs to be done in a digital world. Increased typing speed is a rising tide that lifts all boats.

Typing speed doesn't need to be exceptional to be effective; it just needs to be fluent. **Hunting and pecking requires at least some degree of conscious effort, making it a persistent distraction**. Establishing a mature, error-free typing speed shifts the emphasis from how to type to what to type.

Fifty words per minute is a good baseline for fluent typing. Every increase in speed beyond this is a commensurate gain in productivity. Given the same rate of composition, writers (people writing anything from a novel to an email) who double their typing speed obviously double their output. While some writers to self-consciously deliberate every word, many writers think out sentences faster than they can type. For the latter group, typing speed becomes their bottleneck.

Slow typing also prevents many people from replying immediately to emails that could be answered in under two minutes at the baseline rate. **Hunting and pecking makes email far more labor intensive than it needs to be**.

Typing trainers

There are many different approaches to developing typing skills, from typing classes to books, but I would recommend either training software designed for the purpose, like Mavis Beacon Teaches Typing, or an online typing trainer, like the Flash-based web application at Typing-lessons.org.

Shortcut keys

Learning to use the shortcut keys for your operating system, office suite, browser, or any applications being used on a daily basis will eliminate another speed bottleneck: the mouse. **The shortcut keys for clipboard commands (e.g. Ctrl-C for Copy on Windows) are four times faster than using a mouse to navigate to the menu**.

A good habit to get into when using the mouse is clicking on the menu with the command you want to select; then instead of selecting it with the mouse, use the shortcut key combination listed to the right of the command. You'll memorize the shortcuts for your most frequently used commands very quickly. Find out where the shortcut key reference is in the applications you use the most. In the text editor I use for blogging, Q10, all of the shortcuts are listed in the Help card that comes up by hitting F1. In Google applications like Gmail, the question mark (Shift-/) brings up the shortcut key reference.

Pattern #9: Tickler File

Some paperwork is relevant now, and some won't be until later. If the car insurance bill is due on the 13th, but you get paid on the 9th, you can put the payment reminder on your calendar. Or you can write the check now, stick the bill and check in the envelope, and file the envelope in a dated folder in your tickler file.

A tickler file (or "suspense file") is a file drawer comprised of 43 folders: one set of folders numbered from 1 to 31 representing the days in the month, and another set 12 folders individually labelled for each month. The folder at the front is the one numbered for tomorrow's date, followed by the folders consecutively numbered through the rest of the month, then the ones leading up to today's date. Behind the day folders are the set of month folders — the upcoming month at the front, followed by the subsequent months.

Whenever you get any paper-based material that's not actionable until a later date, you drop it in the appropriate folder in the tickler file. If the later date is in the current month, drop it in the folder numbered for that date. If the date is on a later month, drop it in the folder for that month.

Each morning, you empty the contents of that day's folder into your intray, and file the empty folder at the back of the day folders. At the beginning of each month, you take the contents of that month's folder and distribute each item into its appropriate date folder.

The tickler file essentially works as a three-dimensional calendar. Not everyone will need or want a to set up one. A calendar might be enough, especially if your work environment is largely paperless. But a tickler file does have its advantages:

- Filing the source material is usually faster than writing a calendar entry
- You can keep your calendar clear of date-specific items that aren't mission critical
- Filing the entire document to reference on the date you need to see it avoids having to separately file the item and make a calendar entry for it
- You don't have to copy parts of the document for reference, since you're storing the whole document
- You can defer a thorough reading of a complex document to a date that you anticipate having more time to concentrate
- You can file reminders for making a decision on something later, and keep your calendar for firm commitments exclusively

The biggest disadvantage to a tickler file is that **you have to actually use it daily**. You can't "sort of" use one. Filing a bill for a later date is only effective if you can trust that you're updating your tickler file every single day. If you're just setting up the habit, you may to start out by duplicating any mission critical items on your calendar as a fail safe.

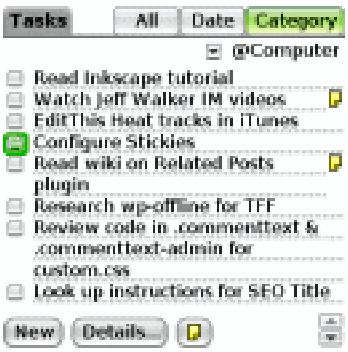
Uses

Bills are the most obvious application for a tickler file, but there are plenty of others. You can write reminders to yourself to resurface on a specific or arbitrary date. If you come across an article from a magazine, or printed from the web, you can file it for some date after a crunch period when you have more time. If a thought occurs to you that you'd like to bring up at next Tuesday's meeting, write it down and drop it in the file for that day — you may wind up with a pile of ideas that accumulated over the week to bring up during the meeting.

If you're studying, you can reinforce your memorization of the material by asking yourself, "When will I start to forget this?"; then file it for review to avoid the risk of forgetting what you've forgotten. You can apply the same technique to reinforcing the motivation to establish a new habit: "When will my enthusiasm start to wane?" You can drop in quotes or essays from virtual mentors at determined or random future dates.

Reminders like these would be harder to cram into a calendar.

Pattern #10: Context Lists



Context lists are a way of organizing next actions by the physical place or resource needed to execute the actions. A shopping list is a familiar context list. Instead of adding shopping items to a To Do list, we segment the items we need to purchase at the store, filtering out the other things we need to attend to. Then when we're in the store, we can concentrate on what we need to specifically do there without worrying about the phone calls we have to make, or the other errands we need to run.

The principle behind the shopping list can be applied to other contexts. A list exclusively for actions that have to be done at the computer, one for things that have to be done at home, and another for things that can only be done at the office are examples of practical context lists.

Why maintain separately lists? Isn't it simpler to have a single list for everything?

By filtering out a view of what you can't do in a certain context, you're left with a list that inherently doable. When you're at a computer, you're confident that when you look at your @Computer list, the list contains everything that you actually can do, and nothing that you can't do. Tasks that can't be done at the computer just add clutter. The most effective task list is one that only has items that are actionable. **The easiest way to go numb to a task list is to combine actionable items with inactionable ones**.

Multiple lists can obviously get out of hand. You'll need to experiment with different list organizations before finding the optimal array of lists that work with your lifestyle. If you work at home, you may not need separate action lists for @Computer, @Calls and @Home (the @ symbol is a common notation for contexts). But sometimes it helps to create separate contexts anyway. It forces you to define a task as a physical, visible action. Does "Contact John" translate to "Call John" or "Email John"? **A well-defined next action list should hold the results of your thinking so that acting from it requires little or no further thinking**.

Nearly everyone needs to customize his or her context lists at some point, but here are the most common ones:

- @Home
- @Computer
- @Office
- @Anywhere
- @Errands
- @Calls
- @Agendas

The latter context contains issues that need to be discussed with a particular person. There are two main ways of organizing agendas lists. You can simply create separate @Agendas lists appending an individual's name to each list (@Agendas-Fred); or in an electronic organizer, you can usually create a nested list: the names of the individuals are listed in @Agendas, and the actual agenda get listed in the note field for each entry. If you use a Palm organizer, see How to Set up GTD on a Palm for more information.

Some uncommon, but potentially useful contexts:

- @Computer-Online (if connectivity is not constant)
- @Library
- @Notebook or @Writing
- @[secondary work site]

Never hesitate to add a new list if you suspect that there's a better way of filtering your tasks, and importantly, don't hesitate to drop and consoldate lists if they're just adding overhead. The goal is to have a few lists as possible, but as many as you need.

Pattern #11: Hard Landscape

A calendar serves two purposes:

- It shows what times are committed
- It implies by omission what times are available

The first one is obvious. The second one contains a subtle corollary: **A calendar is not a To Do list**. The quickest way to erode the authority of a calendar is to fill it with tasks that may or may not get done that day. Use a calendar for planning, not goal setting.

Tasks fall into two categories of time commitments: hard landscape and discretionary time. In landscaping, "hard" features like patios and fences are non-negotiable fixtures, unlike plants and rocks that can be moved to accommodate shifting design priorities. In a task management system, a calendar is most effectively used for fixed activities like meetings, deliveries and scheduled performances. **The whitespace on the calendar is used for working off of Next Actions lists**.

Three main types of entries go on the calendar:

- Appointments
- Commitments to and from others
- Optional events or information specific to a day and time

Look at the calendar not just for things to do, but for intervals of discretionary time to complete the highest priority next actions that can be done in that time in your current context. **The calendar and action lists work together. One is not a substitute for the other**.

Optional events are time-dependent events like a concert, seminar or television show. They're not "hard landscape" in the sense that they have to be addressed, but that they happen on a specific day and time that makes the opportunity lost afterward.

Some items are specific to a day, but not necessarily to a particular time. Things like filing taxes or shipping an order need to happen by the end of the day or the workday, any time within the day is fine. Day-specific items can be entered as "All Day" or "No Time" events on your electronic calendar. On paper calendars that organize the day in hourly line items, place day-specific entries in the "To Do" sidebars to avoid binding them to a certain hour. **Take care of the calendar entries before next action items**.

Items that are time-specific, of course, go on the calendar at their appropriate time. The advantage of taking the hard landscape approach is that you keep as much clutter as possible off of the calendar, so that when you look at it, you're sure that the entries for that day are the ones that actually need to get done, and not just "shoulds."

Pattern #12: Deferred Work

"Do it now!" is often good advice, but depending on what needs to be done, now is not necessarily the most strategic action choice. **Many times we prioritize our reactions to information based on how recently it entered our world, or how much emotional charge it carries**. Acting on any intention the moment it occurs may even be a form of procrastination when priorities are taken into account. We want to do better than react to latest-and-loudest.

A task can be done, delegated or deferred. Since we can only do one thing at a time, but often think of more things faster than we can act on them, the discipline of collecting and processing any thought other than the one thing we're actively doing is the master key to maintaining focus. **Trying to keep one thing in mind while working on another inevitably compromises one of the two**. Attention is diverted from the active task in the effort to hold the unrelated information in short-term memory — "mental RAM."

There's no way to do everything at once. There's no way to do even more than one thing at once. What's usually called multitasking is actually rapid switching between single tasks. Juggling rote tasks doesn't consume mental RAM, but as soon as one task requires concentration, it becomes essential to eliminate secondary tasks to prevent the overhead of regrouping.

As soon as a new thought occurs that's not immediately actionable or applicable to what you're currently doing, write it down. Then process what you've collected by deciding if there's any action required on it, and if so, identify the successful outcome and the next action. Otherwise, decide if it's just a thought you can scrap or stage for review at a later date.

There are four placeholders, or "buckets" for deferring work in a trusted task management system:

- **A Next Actions list** for tasks with no time dependencies
- **A calendar** for hard landscape items that are time dependent
- **A Someday/Maybe list**, if it's a potential project with no commitment on, except for evaluating in a Weekly Review
- **A tickler file** for items to review at a later date, but not during a Weekly Review

Anyone implementing a thorough GTD system will review next actions, the calendar and the Someday/Maybe list at least once a week during a scheduled self-consulting session called a Weekly Review, which will be discussed later in this series. The tickler file defers an item until a specific date, at which time it goes into the intray for processing.

Determining the appropriate placeholder for each processed item, as well as filing non-actionable reference material, is know as the organizing phase, following the collecting and processing phases.

Pattern #13: Two Minute Rule

Some tasks are better put off until higher-priority tasks are completed. If you're working on a sales report, and suddenly think about researching a new car you'd like to buy, it's best to put "Research car purchase" on your project list or "Look up Prius on ConsumerReports.com" on your @Computer list, and handle it later. **The time and attention it would take away from finishing the sales report would make it counterproductive to do now**.

But if an action is very short, it's more efficient to do at once than add to a list. The Two Minute Rule is a guideline to keep your lists free of minutiae. The rule is simple:

If an action takes less than two minutes, do it now, even if it's a low-priority item.

There's simply no point in putting it off. Since a next action that's not being done in the moment would otherwise need to be written down to stay out of your head, you need to think about whether or not it's more efficient to add it to a next action list, or to get it done once and for all. **At two minutes or less, it would take longer to write an action down, review it later, and check it off than it would be to just do it in the first place**.

There's another advantage to applying the Two Minute Rule. **By consciously asking yourself, "Will this take more than two minutes?", you're less likely to become engrossed to relatively short actions aren't short enough to prevent becoming digressions**. Is that "quick lookup" on Wikipedia really a two minute action? Reading the article might take a few more minutes than expected. It might be more strategic to look up the article, print it, put it in a Read/Review folder, and read it when you have more time and attention to devote. The Two Minute Rule is a guard against serial digression — "rabbit trails."

One frequent reservation about the Two Minute Rule is that a person risks spending all day on small items, never getting to the larger, more important ones. **The first question that needs to be asked about any action is: Does this need to be done it all?** If the answer is yes, the only alternatives are to do it now, or write it down for doing later. The more items you see on your list, the more likely you are to resist looking at the list, even if half the items on it could be done in 30 minutes combined.

Second, the number of items that actually take less than two minutes is much smaller in reality than it is intellectually when you apply the rule for each action as it comes up. The whole idea of spending "all day" doing two minute actions is based on assumption, not putting the rule into practice.

Third, **just because an action is short doesn't make it unimportant**. Not taking one minute to approve a purchase order can hold up a very large project. It's not uncommon for sizable project to get held up for hours or days simply because someone shoved the paperwork involved to one side, and didn't look to see that all that was required on it was a signature. I once took over a job processing orders in 10 minutes that the previous employee kept piled for an average of four days.

With email, it's critical do decide whether or not a message can be answered or addressed in two minutes or less. Email accumulates too quickly to simply gaze at each message without making a decision about it. **Decide now if an email can be trashed, archived, addressed or answered in two minutes**. If not, immediately identify the outcome and next action required, and place them on your project/next actions list.

Pattern #14: Read/Review Folder

Information overload is the stress of infinite opportunity. In a world of bottomless information resources, the need to ruthlessly gatekeep our information intake is absolute.

Working online is a walk through a minefield of time sinks disguised as quick lookups. **One of the best reality checks against getting drawn into interesting articles is applying the Two Minute Rule: "Will this take longer than two minutes to read?" If the answer is yes, read it now if it's appropriate** (as adults, we know when and what to read at work).

If the answer is no, print the article and put it in a folder labelled Read/Review. Use any odd windows of time during the day to read these items. If a meeting starts late, if you're on a train, if you're stuck in a long line, chip away at your Read/Review folder.

Use the Read/Review folder for any paper-based discretionary reading — not just printouts of online articles, but memos, magazine clippings, or any other materials that fit. **The Read/Review folder is for discretionary reading, not for active projects**. Project support material should be put in appropriately labelled project folders, which will be addressed later. Content in Read/Review is unsorted and unprioritized.

There are other, possibly more ecological, ways of collecting Read/Review material. You can bookmark articles, email them to yourself, or archive them if they arrived as RSS feeds. But a physical folder has a few advantages:

- It can be read through anywhere, particularly offline
- Paper immediately gives you a sense of how much volume you've committed yourself to reading, encouraging you to eliminate the nonessential
- It corrals papers that didn't originate online, preventing them from spreading out over every surface in the home and office
- Separate placeholders for discretionary reading and project support material prevents perceiving all paperwork as a single mass that can't be easily prioritized
- Keeping articles off of your Next Actions keeps your lists manageably short

Read/Review can work in combination with a tickler file if you'd like to manage the total amount of reading that goes into your folder each day. Instead of filing an articles directly in Read/Review, you can distribute articles across future dates in the tickler file — one article each day, for example.

Pattern #15: Project Files

Paperwork should not be used as a reminder of what to do with it. **Once the project and next actions associated with a document have been identified and placed on their corresponding lists, the best practice is to keep the document out of sight until it's actually needed**. Like books in a library, documents should be retrieved on an as-needed basis, and filed away when not in use. **Reserve the surface of your desk for your one current task, and immediately file away unrelated materials**.

When determining what to do next, refer to your calendar and next actions list, not your paperwork. Paperwork associated with an action or project should be filed away in a labelled project support file.

For example, if the project is purchasing a new car, any printed specifications, quotes and other materials can be collected in a file labelled "Car Research," then stored in your A-to-Z general reference filing system. The paperwork never gets a chance to mix with other paperwork on your desk, since it and the paperwork for all of your other projects reside in your file cabinet. When you need ask the sales representative a question, you can pull out the project support folder and have your information at hand when you need to refer to it, then put it away at the end of the conversation. **The reference material is never in your way, physically or mentally, when you need focus on other tasks**.

By keeping project and action support material in labelled folders, and keeping discretionary reading (wiki printouts, interesting web articles, etc.) in a separate Read/Review folder, **your brain will trust that if you need paperwork that's related to an active project, all you have to do is think of the name of the project, and you'll know where to find it**. Discretionary reading does not need to be methodically indexed. Let its current relevance and your interest be your guide.

Active Folders

Some files need to be retrieved throughout the day, making repeat reaches to the file cabinet inconvenient. **For those few files, keep them in a tray on your desk underneath your intray**. Be sure to retire them to the file cabinet when they no longer need to be close at hand. **Your desk should be a workspace, not a storage bin**. Your Read/Review folder should also have a tray of its own.

Labelling Tips

Use typeset labels. Using a typeset labeler to label your files instead of doing so by hand is somewhat slower on the front end, but greatly streamlines the retrieval process — especially when you see a cabinet of entirely typeset-labelled files. **Since each file is created once but retrieved many times, making it as easy as possible to scan and locate the file is worth the additional setup time**. Keep the labeller as a permanent fixture on your desk, close at hand, to keep setup time to a minimum. Be sure to have a least one replacement cartridge on deck at all times, otherwise you may wind up a day's worth of unlabelled files. **If labelling is not fast and convenient, you probably won't do it**.

To make folders reusable, apply clear tape to the tabs. As mentioned in Pattern #6: General Reference Files, we want to the tab on the folder itself, not a plastic tab that attaches to a folder hanger. If you put clear tape on the folder tab, any typeset labels you stick on will come off without much effort, allowing you to reuse them. If you're setting up a new filing system, you may want to spend the extra time putting clear tape on all of your folders. This will save many trips to the office supply store, not to mention money.

For frequently used project folders, add a duplicate label at the bottom edge. For the tray that holds your frequently retrieved folders, insert the folders with their spines facing you, so that you're not looking at the tops of an unidentifiable bundle of papers. If the files are given a label toward their spine, you won't waste time shuffling through papers to find the right set.

Pattern #16: Ten Minute Dash

Action is experiential. The more we experience doing, the less effort we realize it takes. The more we imagine doing, the more effort it appears to take. **We need a way to externalize our thinking**, a tool to bypass our mental process. Fortunately, there's a time-tested way to jump start any daunting task:

Set a timer for 10 minutes. Attend to the task without interruption until the timer goes off.

Only your presence is required. If you can fill the 10 minutes with constant output, so much the better. If most of the time is spent doing nothing but thinking about how to start, that's fine — you were doing that anyway. **The objective is not production, per se, but disrupting inertia**. The only rule is that you have to be where the action is for 10 minutes, and do either absolutely nothing else, or do nothing at all.

Once the timer has goes off, you have two options: take a break, or set the timer for another uninterrupted session with a length of your choosing. You'll find, more often than not, that you'll want to continue. **Whether you choose another 10 minutes, 30 minutes or 3 hours, you're committed to doing nothing else, so choose the session length wisely**. Don't bite off more than you can chew. When the new session is over, take a break or do another session, repeating the process as often as necessary or desired.

The initial 10 minute length is arbitrary, and can be adjusted. If even 10 minutes makes you anxious, set the timer for five. But be sure to use a timer. **Don't keep time in your head**, which is as inefficient as a professional musician practicing scales without a metronome. Tracking time in your head while trying to focus on a task is like running a resource-intensive background application. Your attention inevitably has to break away from your primary task to refocus on time orientation.

One important exception to single tasking, here or in any context: Keep a collection tool like a notepad close by at all times. **If a thought unrelated to your committed task enters your head, write it down, then return to the task**. Writing it down is not an interruption. You're writing down and diverting the interruption.

Pattern #17: Batching

Repetitive tasks are usually not high-priority ones, but they still need to be done. The fact that they need to be done doesn't mean they need to be done the moment they have your attention. **Let them accumulate, handling them at optimally infrequent intervals, between which you spend the bulk of your time focusing on higher-impact tasks**.

Instead of making a commute for each new errand, write all errands on your @Errands context list (after deciding that it really require a physical trip instead of, say, a phone call), and aim to batch the completion of all errands in a single loop between home and work. Instead of making numerous non-emergency calls throughout the day, set specific times to place and return phone calls.

For knowledge workers, **email will be the single most repetitive task that can benefit from batching**. A common recommendation is for two email sessions per day: 11:00 am and 4:00 pm, for example. Another is for once every hour. Response requirements will naturally depend on your job — batching is a non-starter for financial traders — but few jobs actually require the persistent availability that's usually assumed.

Fine tune your email batching by starting with once an hour, then gradually increase the length between sessions. Some people will find that even once a day is enough.

Escape the inbox. Focus primarily on output. Turn off email notifications and decide to let email collect in sufficient quantity to justify processing the entire inbox in one sitting. Checking email at arbitrary times leads to a habit of looking for emergencies, which you'll inevitably find as a self-fulfilling prophecy.

Most of us our have at least some inefficient people in our lives who impose manufactured emergencies on us in order to make themselves feel important. **A protocol of answering email at regular intervals helps put you in control of the information flow, thinking instead of reacting**.

Pattern #18: Waiting For List

To bring a project to closure, we need not only to keep track of our own actions, but those of others. Legacy To Do lists are not designed to track external dependencies. We need a language to identify all components of a project, not just the proactive.

Whenever a project requires information or a delegated action from others, put it on a list called Waiting For.

An example of a short Waiting For list would be:

- Michael 7/21: Gantt for store remodel
- Laura 7/20: artwork for client presentation
- Amazon.com 7/20: Andrei Roublev Criterion DVD
- Frank's Auto 7/19: status on transmission replacement

Each item contains the person or organization from which you need a deliverable, the date when the action was delegated or when the information was requested, and the action or information itself. Other information potentially helpful to include are due dates, phone numbers or email addresses of the parties involved. If you have an electronic organizer, you can paste sections of pertinent emails or information from relevant websites into the note field of the corresponding line item on your list.

The Waiting For list needs to be reviewed as regularly as other context lists — at least once a day in your daily review, but as often as you need to ensure that your projects aren't being orphaned by the inaction of others. If you're responsible for the project, you're as responsible for the component actions of the project you delegate to others as your own actions.

Avoid keeping a mental account of what others need to bring to the project. A busy office culture frequently makes every attempt to stop and think seem frivolous, and it's tempting to take the shortcut of assuming that others will do (or remember accurately, if at all) what you ask of them. If it's important enough to be done, it's important enough to write down and track.

Having a Waiting For list is essential for identifying dependencies that need to be resolved before you can take further action on a project. Finalizing the budget for a remodel requires Michael to present a plan that includes a timeline with estimates on labor and materials. The client presentation can't be rehearsed until the PowerPoint file is finished, requiring artwork from Laura.

Once you get in the habit of having a current list for every incompletion, it becomes much easier to identify potential problems before they become actual.

Pattern #19: Someday/Maybe List

The flip side of managing commitments is managing options. **There's a subtle but fundamental difference between choosing not to act on an option and not choosing to act on it**. The former is proactive triage, the latter is indecision. Some things are not worth doing now, but possibly later. Some things, though interesting, are not realistically worth committing time or energy on, now or later.

For any project that you're not able or willing to commit to now, but possibly later, put it on a list called Someday/Maybe.

A few items on the list would be things like:

- Train for and complete a marathon
- Install hardwood floors
- Start a speech consulting business
- Vacation in Luang Prabang

Someday/Maybe completes an organizational framework of five major placeholders. Intray paperwork and inbox email will either get discarded or processed into one or more of the following categories:

- Next Actions (optionally organized by context)
- Projects
- Calendar
- Waiting For
- Someday/Maybe

Putting items on a Someday/Maybe list allows you to consciously decide whether or not to keep them as future options. Going to graduate school might be a worthwhile project, but not actionable until you've fulfilled certain short-term career goals. Putting a down payment on a car might not be a priority until you've established an adequate emergency fund. Changing cell phone carriers might be an option to take after the contract with your current provider has expired.

Some projects seem like remote possibilities, like starting a newspaper, but no matter how much you try to dismiss them, they keep haunting you. **Keep them on your Someday/Maybe list, and out of your head**. Each week you get a chance to review each item on the list and decide that it's still a Someday/Maybe, that it's time to make it an active project with a next action, or that it's time to cross it off the list once and for all.

In a world of infinite options, there's always the danger of the Someday/Maybe list getting out of hand. Most people who keep the list find that it becomes larger than their Project list. So how to we decide whether to put it on Someday/Maybe, or leave it off entirely? **If there's a strong possibility that you'll think of the item again over time, it should probably go on Someday/Maybe**.

There are other ways to manage options. If you have a tickler file, you might want to write a note to yourself, and file it for review at a date that's arbitrary (e.g. in two weeks) or relevant (three days before an event); then it's out of the regular review process. You can defer a decision by putting the item on your calendar, and review it on that date.

If you have many options that fall in a single category, like DVDs to buy or books to read, it's more manageable to keep them in their own checklists. Someday/Maybe is ideal for items that you would potentially migrate to your Project list. For instance, I keep a backlog of article ideas on a checklist, articles currently being written on my Project list, and imminent writing projects on Someday/Maybe.

But how you manage future options is more of an art than a science. Experiment until you come up with a set of placeholders that makes intuitive and logical sense.

Pattern #20: Process Projects

When we're undecided on whether or not to commit to a project, one option is to shelve the project on a Someday/Maybe list. But sometimes indecision stems from insufficient information. We need to get enough data to make sure that deciding not to do something is a proactive choice, made from reason or informed intuition, not intellectual laziness.

If you don't have enough information to commit to a project, make getting the information the project.

You want to start a speech consulting business, but keep putting it off due to a tacit uncertainty that there's enough of a market for it. Before embarking on a project called "Start a speech consulting business," the first project that needs to be completed is resolving the uncertainty: "Assess market for speech consulting services."

Then determine the next action or subproject. An example would be "Set up Google Adwords campaign for multivariate test." Since this is not something most people have the knowledge to do in one step, it would probably best go on the Project list. Then we need a solid next action to move the project forward — maybe "Read introductory pages on adwords.google.com".

We're basically processing an potential project to see if it's worth doing. It's a feasibility study. Processing a project is a project in itself — a "look into" or process project.

"R&D" is a common shorthand for process projects on a Project list, as in "R&D: Getting a financial advisor." You might prefer others:

- Assess
- Look into
- Research
- Determine
- Evaluate
- Compare
- Test
- Draft

- Brainstorm

Notice that the latter two phrases involve **getting information from yourself rather than outside resources**. Sometimes you just need to know if you know enough to move a project forward. **Think twice about reflexively consuming more information instead of thinking proactively**. If you draw a blank, the information resources will still be there.

Process projects are not open-ended information buffets. The object is to determine either whether to proceed with the target project, or how to proceed with it. For action we need sufficient information, not complete information.

If the target project is affirmative, put it on the Project list along with any subprojects that might be involved (any multiaction task is referred to technically as a "project," so subprojects also go on the Project list). If it's determined that the project is not worth pursuing at this time, but possibly later, put in on the Someday/Maybe list. If it's determined that it's not worth doing now or later, dump it out of the system.

Pattern #21: Weekly Review

A common problem with task management systems is the length of time that entries remain unexamined. Action lists contain items that no longer reflect current reality. Things that seemed like good ideas at the time they were written down are no longer priorities, no longer practical, or simply no longer interesting.

Hard landscape items on calendars are as valuable for seeing the discretionary time between them for working off action lists as they are for tracking the appointments themselves. **For calendars, action lists, and other support material to work effectively, they need to be examined and updated regularly; otherwise they fall into disuse, and the mind takes up the slack for tracking actions and projects, which is unscalable**. The short-term memory space, the "mental RAM," that defines our attention span is too limited to track dozens of projects simultaneously.

Many people are surprised to find that when they collect and process everything in their lives for the first time (paperwork, email, verbal commitments, inchoate plans), they typically wind up with 40 to 60 projects and 100 to 200 next actions. This load is overwhelming directly to the degree it's kept in the mind instead of an external system. The system needs to be complete and current for the mind to trust it. The goal is to keep your mind clear.

To maintain a trusted system, schedule a meeting with yourself at least once per week — a Weekly Review — to add missing actions and projects, to eliminate completed ones, to eliminate or reevaluate ones that are stuck, to update support materials, and to reconsider active projects and someday/maybe options.

Schedule the weekly review in advance. As with physical exercise, weekly review sessions should be done to a protocol, not on a whim. Doing a weekly review when the mood strikes is a formula for failure.

How long should a weekly review take?

The honest answer is: as long as it takes to no longer have anything on your mind. As you complete your review, you reach a tipping point where you can start to feel your stress and preoccupation with "all the things" you need to do melt away — it becomes like a 21st Century form of meditation. You catch up with yourself, bringing your relationship with the small and large changes in circumstance that have accrued over the last seven days into harmony.

The practical answer is: one hour. Many erstwhile adherents of GTD undermine their once-per-week discipline by either scheduling two or more hours for the weekly review, or not scheduling the review at all. If your review is excessively long (scheduled) or open-ended (unscheduled), you'll end up looking for or creating gratuitous actions and projects to fill time.

A more refined answer is: start with one hour, then adjust the time incrementally as needed. You may actually need two hours, or possibly 30 minutes — when everything is off of your mind, you'll know. But to get the ball rolling, commit to a one-hour dash, then reflect on whether or not you have any open loops that still need to be closed.

When should the weekly review be done?

The best way to know is to experiment. As a freelance writer I have the luxury of doing a weekly review any time, but I schedule a 90-minute block on Saturday mornings between 8:00 and 9:30 at the café around the corner from me. When I had a real Monday-to-Saturday job, I scheduled the review on Sunday morning. **I personally prefer doing weekly reviews on off days, since nothing gets work off of my mind like a weekly review.**

Others prefer to do their review during the workweek, in the office. A frequent opportune time is Friday afternoon, when work is winding down but coworkers, clients and vendors are still accessible. Some people schedule theirs on Wednesday to get a "second wind" in the middle of the week. I found that I was too conscious of the surrounding bustle to do a focused weekly review at work. I should have had the discipline to disengage from the commotion, but couldn't muster it. Others find that having all their workstation's resources at hand — from general reference files to personnel — makes a comprehensive review easier.

What should the weekly review consist of?

It's always a good idea to work from a Weekly Review checklist to work from rather than memory. The sequence can very according to your preferences, but a checklist for a thorough review should include at least the following:

- **Collect all loose papers**, from receipts to contracts, and put them in your intray or "In" folder
- **Process all email in your inbox until it's empty** (see Inbox Zero for the true meaning of an empty inbox)
- **Review your calendar for the previous week**, deleting or rescheduling items as needed
- **Review your calendar for the following week and beyond**, ensuring that it's up to date, adding new items as needed
- **Review any relevant project support materials**, like plans and checklists
- **Do a mind sweep**: write down any thoughts or intentions that are potential actions or projects
- **Process your papers and your mind sweep**, discarding, filing or crossing off each processed item
- **Review your Next Actions**, eliminating now-irrelevant

ones, reevaluating undone/unclear ones (they may simply need to be reworded), replacing completed ones with new ones for their respective projects

- **Review your Project List**, adding new projects, deleting completed and abandoned projects, ensuring that each active project has at least one next action you can take to move it forward, and moving uncommitted projects to Someday/Maybe
- **Review your Someday/Maybe list**, adding newly postponed items from your Project list, adding new potential projects, eliminating items no longer worth considering
- **Brainstorm and capture any new ideas** that may have occurred as a result of your mental housecleaning

The exercise analogy holds. **The longer you wait between reviews, and harder it is to resume the habit**. Your mental inventory keeps piling up, making the process of dealing with it that much more daunting. So do your best to make weekly reviews weekly.

Pattern #22: Daily Review

A complete review of projects and next actions held once per week is critical for keeping your tasks management system trustworthy, preventing "stuff" (unprocessed agreements, intentions, information) from piling up in mind to the point of distraction. **Weekly reviews can be empowering, but they can be too empowering**. From the repose of the weekly review, everything looks doable, and it's tempting to commit to more than what's realistic.

The object of the weekly review is to batch our thinking about everything we have to do during the week into a single session. Then during the week, we work off of the calendar and action lists that hold the results of that thinking. If the calendar and lists go unreviewed during the week, the purpose of having them is defeated. Not only do we need to remind ourselves of what to do each day; we also need to reevaluate what not to do, and remove, defer or delegate it.

To keep your system current, schedule a Daily Review, in which you:

1. Process your intray, email inbox and voice mail
2. Do a mind sweep
3. Review your calendar
4. Review your action lists

The last three shouldn't take long — 10 or 15 minutes at the most. The most time consuming component of the weekly review, reviewing the project list (aside from adding new projects), is not necessary here. Processing will take the most time, commonly an hour to 90 minutes.

Does anyone have that much time? Think of it this way: **you can handle the load piecemeal throughout the day, regrouping each time you chip away at your inbox, or you can batch process the bulk of your new inputs into a single session**. Keep in mind that what's being processed is work, not something in addition to it. It doesn't go away just because it's not processed.

If processing is the your first order of business each morning, you have the security and serenity of knowing that your inbox doesn't have any time bombs lurking in middle of the stack. And when new inputs arrive during the day, it's much easier to process them in real time if desired, because they're not part of a mass of unexamined priorities.

What about the oft-repeated advice not to check email in the morning? Here we're not "checking" email; we're processing it, responding immediately to under-two-minute messages, deleting or filing irrelevant or inactionable ones, and moving actionable ones to an @Action or Follow-Up folder — extracting any projects or next actions.

By methodically processing email instead of haphazardly checking it, we get if off of our minds and into the system. When it's time to start working, we're not preoccupied with our inbox because we've made decisions on everything that needs to be done with what has now been cleared from it.

Pattern #23: Agendas

Many activities can be batched, not just repetitive ones. We have context lists that group like activities by the location or resource required — an @Computer list for tasks requiring a computer, an @Home list for tasks that can only be done at home, and so on. We can batch the processing of paperwork and email into discrete sessions of minimal frequency — twice per workday, for instance.

We can also batch our discussions with individuals. Instead of walking over to a coworker's desk every time we come across an issue that needs to be discussed, we can take a moment to evaluate the urgency of the matter, and in the likely event that it's actually not an emergency, batch it in a running track of issues that accumulate during the day.

Create a list called Agendas, with the names of everyone with whom you need to discuss non-emergency issues, then list the topics within each of those entries

Agendas is another list among the others to track in your system: Next Actions (Context Lists), Projects, Waiting For and Someday/Maybe. While the latter ones are flat lists, the Agendas list is nested. **In an electronic organizer, each person's name is a line item in Agendas, and each line item has a note attachment, within which the issues are added**.

If you maintain a list with only a few people, an alternative to a nested list is simply having a separate flat list for each individual — @John, @Susan, etc. — then make each issue a line item. This is a good way to manage agendas if you're using a paper-based system. Depending on the nature of your work, it may be a better idea to use an Agendas folder instead of just a list. This allows you to have any support documents relevant to the conversations right at hand.

Potential Problems

Beware. **When batching several topics into one conversation, the other person — not accustomed to consolidated discussions — may dislike the perceived additional time it takes**. Despite the obvious fact that interrupting someone 12 times a day takes more time than handling 12 topics in one sitting, many people are so used to asking and answering question at a time that an agendas list will seem like a burden.

Just because you have all topics in one list doesn't mean that you necessarily have to cross everything off the list in a single discussion. There's a point of diminishing returns where efficiency and effectiveness diverge. You may only get to work off a few topics at a time before the other person has to return or move on to some other task. Pick the highest priority items on the list that you can fit in his or her window of time, and do the best you can.

In some cases, all you have to do is point out the advantage of handling everything at once: “I could see that you were busy, and I didn’t want to keep interrupting you, so I decided to these things until we both had time to talk.”

Finally, reevaluate your list, and see if there aren’t some items where another communication channel might be better suited, like IM, email, Twitter or a wiki — especially for status updates. The less interaction you need, the better the chances are that using these media would be a less time consuming and disruptive way to keep people in the loop.

Pattern #24: Horizons of Focus

Our priorities are based on our time frames. When we eat an ice cream, we’ve made short-term enjoyment a priority over long-term health and vitality. When we postpone dinner with family and stay late at the office to complete a project, we’re making another priority choice. **These may or may not be the right priorities, depending on their context and personal values**. To keep our priorities congruent with our values, at helps to categorize them by levels of focus.

To clarify the impact and implications of your actions and projects, review them against your horizons of focus.

Horizontal and Vertical Focus

From moment to moment, we make choices of what to do and what not to do. **The total impact of our lives is the sum of these choices**. Each completed action satisfies some need in a broader context. Mundane tasks, like shopping, satisfy subsistence needs, contributing to your overall health. Researching a car purchase has implications for the image you project, and the transportation necessary to support yourself and your family. When we write down, think about or review discrete actions like grocery shopping or reading “Consumer Reports,” we are employing horizontal focus.

Horizontal focus refers to anything on the level of actions: errands, reading, phone calls, face-to-face conversations, purchases, drafts, email and so on. We need horizontal focus — it’s the level of practicality that turns visionary aspirations into visible pathmarks. We need the single step that gets the thousand mile journey out of our heads and onto the earth.

Horizontal focus is necessary but not sufficient. Particularly in the wage earning service sector, routine often prevents workers from looking beyond an immediate task, and they wind up spinning their wheels, being busy without being productive in a purposeful sense. Even many professional workers have trouble escaping the busy trap. A single action, like writing an email, consumes more time and attention than the overall value it adds in the scheme of things.

Vertical focus is the scheme of things. Here we add perspective to our action choices. In GTD, we look vertically at five horizons of focus, using altitude metaphors:

1. **Runway: Next Actions** — the immediate tasks we need to track to move a project forward
2. **10,000 feet: Projects** — any outcome that takes more than one action step to accomplish
3. **20,000 feet: Areas of Focus** — the aspects of our lives that need to be reviewed for balance
4. **30,000 feet: Short-Term Goals** — outcomes that we intend to accomplish within 1 to 2 years
5. **40,000 feet: Lifestyle Goals** — the long-term vision (5 years and beyond) of our ideal lifestyle
6. **50,000 feet: Life Purpose** — the impact we would like to have on the world

If it’s not obvious, the specific timelines of the time-based horizons are somewhat arbitrary. We can think of a three-year goal as 30,000 feet, and it’s possible to realize at least some aspects of our ideal lifestyle in less than 5 years. Some people will quibble about the scope of “projects” encompassing everything from getting a round of venture capital to buying a sofa. Some people organize their life planning into quarterly goals. **Use the time frames that make sense to you, in the language that make sense to you**.

Runway and 10,000-foot levels have been discussed previously as Outcome and Action. Notice that two of the horizons in the list above are not part of a timeline. For the 20,000-foot level, areas of focus (not to be confused with horizons of focus), we list and examine the categories of our lives that matter to use. For instance:

- Marriage and family
- Finance
- Health and fitness
- Friendships
- Career goals
- Fun and recreation
- Creative expression
- Politics and community

These focus areas will vary from person to person — some people aren’t involved in politics and community, for instance — so it’s important to **choose the values that truly matter to you personally; don’t just inherit someone else’s platitudes**.

The value in constructing the focus areas list is that **you can use it to make sure that you have at least something on your project list that represents fulfillment in each of these areas**. You can use it during the weekly review to ensure that your project list is reasonably well balanced. You don’t want to fill your idle time with work just because you didn’t take fun seriously enough to incorporate it into your system. **Look at each area and ask yourself if there are any projects, process projects or someday/maybes that still need to be captured**.

The 50,000-foot level, raises an existential question, “What is my purpose here on the planet?”, that some people can answer with enviable clarity. For most of us, it’s a question we have to revisit periodically, answering it with intuition that grows more articulate over time through engagement and experience.

If necessary, reframe the question in a way you may find more answerable: “What impact would I like to have on the world?”, “What value do I have to offer?”, “What would be the most fulfilling expression of my life energy?”, “What is the legacy I would like to leave?”, and so on. When in doubt, think of the most reasonable, honest answer you can, even if you sense that it’s incomplete on some level, and put that down as your working 50,000-foot purpose; then examine it against your other horizons of focus and see they’re in accord, adjusting if necessary.

Pattern #25: Brainstorming

Before we can manage our options, we need to have options. By default, the brain organizes learned experience into stable perceptual frameworks and common response patterns. It needs to do this. We wouldn't want to consider every possible way of crossing the street; we just look both ways and walk if we see no coming vehicles. When encountering new situations, we usually draw on experience for efficiency's sake. We do what works: if it ain't broke, don't fix it.

But sometimes we need to approach a problem or a project in a new way, even at the expense of efficiency. Instead of pursuing the first idea that occurs to us, we need to open up our menu of options.

To brainstorm on a problem, capture the obvious solutions first, then allocate a period of time to think of as many alternative solutions as possible without judging them. Then reexamine all solutions.

A good time period to start with is three minutes. Within the three minutes, continue to generate alternatives, even if — especially if — you come up with a good solution well before the time period ends. Use all of the time you've allocated. You can pick shorter periods or longer periods. But shorter periods tend not to be long enough to think of many new approaches. Longer periods, like 30 minutes, will tend to yield mostly minor variations on few fundamentally different approaches.

An Example

Someone want to cancel his cell phone account due to poor coverage and poor customer service, but he's still under contract and would have to pay an early termination fee. The obvious options would be:

- Cancel and pay the fee
- Wait for the contract to expire

Then he lists some alternatives, without worrying about whether or not they're usable. They may not be usable in the form they're first expressed, but might be with some modification. In any case, he forges ahead:

- Demand unlimited roaming, threatening to cancel if not honored
- Downgrade to the carrier's cheapest plan, porting his main number to a new carrier
- See if the charges can be expensed by his company for the remainder of the contract, using a new phone and carrier for personal calls
- Call CS and answer "no" when asked if he's satisfied with his service

None of these are particularly sound alternatives, but they may lead to a creative accommodation. Let's look at the second example: downgrading. He might currently be paying $60 a month on his current plan. He finds that he can get a bare bones plan (100 minutes per month, no text messing, etc.) for $20. Doing some research, he discovers that another carrier is offering a plan for $40 a month that's nearly identical to the $60 plan he signed up for 10 months ago. So he adds the second carrier, using their line for his primary phone (with or without number portability), then dumps the unwanted carrier when the contract expires. He might even be able to combine that alternative with the third one — getting one of the lines expensed by his company.

In the fourth example, he can either make a call to customer service on some routine pretext, or use the first option, demanding unlimited roaming. At the end of the call, when he's asked if he's satisfied with his service, he tells the representive that he's not. In many cases, negative feedback gets escalated, and someone in management calls back the customer to see if there's some way to improve the situation.

He may end up opting for the obvious approaches, but by brainstorming he now has three times as many options as before, none of which are exclusive. Any of these approaches can be further examined for improvement opportunities: What would it take to make this solution work?

Brainstorming for Problems

Sometimes the difficulty in solving a problem lies in how we've defined "the" problem. Framing a problem a certain way frames the array of potential solutions. Someone wants to reduce her fast food consumption. Alternative problem definitions might be:

- Finding more time to cook at home
- Finding meals that are quick to prepare
- Becoming more proficient at cooking
- Ordering fast food in smaller sizes and quantities
- Transitioning to a diet low in sodium, fat, carbohydrates, etc.
- Minimizing or avoiding exposure to fast food venues

She expands way she defines the problem first, creating alternative problems, then takes each or any one or these and brainstorms alternative solutions.

Just because we think of a problem or solution in a certain way first doesn't make it the best way. By generating alternatives, we create a broader context for deciding the best course of action. If the first, obvious approach turns out to be the best one, we've lost nothing by thinking beyond it.

Free Association

In addition to generating alternatives, we may need to simply capture aspects of a problem to make sure that our attention has covered a sufficiently broad scope. Several diagramming options like mind maps are applicable, but in many cases all that's required is a simple checklist. Applying checklists to the fast food example:

- saving money
- eating less
- cooking
- health
- meal times
- exercise
- menu options
- convenience
- appetite
- habit

And so on. Any of these considerations can be expanded into its own checklist. An outliner, like OmniOutliner or Microsoft Word's Outline View, provides a good structure for nested checklists: lists can be expanded, collapsed and reordered. As with brainstorming, define a time interval to generate considerations, and keep free associating until you reach the end of that period.