

(2) **Current Projects**--a file folder containing three lists of multi-step tasks that you plan to accomplish soon:

- Current Projects for YOU
- Current Projects for YOUR FAMILY
- Current Projects for things BEYOND (paid work, volunteer jobs, etc.)



(3) **Important (not Immediate) Next Actions**--this folder contains five context-based lists of tasks you'd like to do within the next few weeks or months (or as soon as it's convenient).

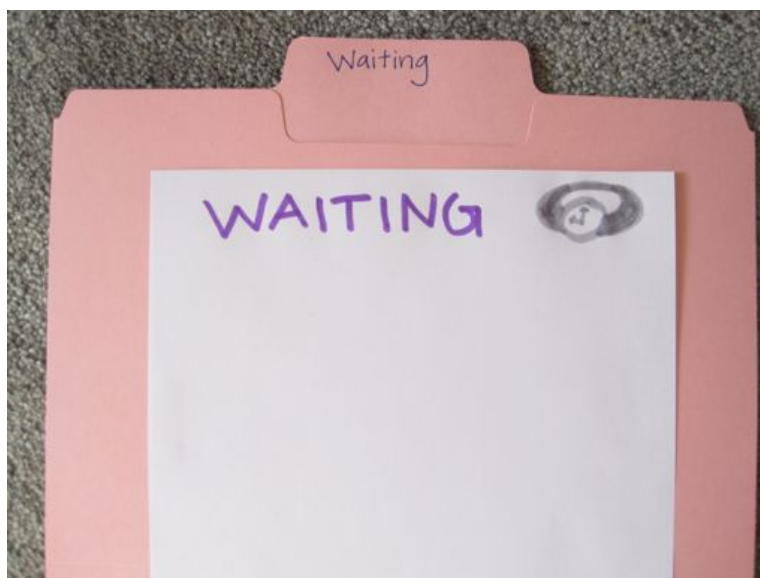
- Phone calls
- Things to do at home
- Computer work
- Errands
- Things to discuss with spouse



(4) **Routines and Responsibilities**—another folder that keeps track of all the regular things you do each week that don't really need to go on a calendar. It contains one sheet of paper which has "Daily, Weekly, Monthly, Quarterly, Yearly" across the top and "For YOU, for YOUR FAMILY, and BEYOND" along the left side. Items on these lists might include daily exercise, weekly library trips, or monthly neighborhood meetings.



(5) **Waiting**--a folder containing a sheet of paper where you record things you are waiting for *others* to do before you can move forward on specific tasks (like if you're waiting to hear back from several of your friends regarding who wants to participate in your Learning Circle).



(6) **Goal Review**—a fifth folder containing personal lists you want to review weekly: affirmations, habits, goals, etc. You wouldn't write, "Be a fun mom" on your calendar or task list, but you could put it in this folder with a list of your other goals.



Right Section--Things that are Off Your Brain: You'll keep these items on or near your desk.

(1) **Current Project Support Material**—a set of 10-12 cubbies organized to hold folders, notes, and resources related to projects on your Current Projects List. Each project has its own file folder, and similar projects are grouped together.



Here is a possible list of categories for your support materials:

“For Me” Cubbies

- Personal Education (notes from your reading, class registration forms)
- Personal Journal or Blog Ideas (no more scribbled notes in random places)
- Personal Health and Fitness (gym schedule, diet tracker)
- Social Correspondence (letters and invitations that need a response)

“For My Family” Cubbies

- Finances/Bills
- Family Systems (kids' chore charts, list of family laws and consequences)
- Home Management (estimates on repairs, list of trusted contractors)
- Children’s School Projects (assignment sheets, printed resources)
- Family Activities (coupons, fliers, ideas you've jotted down)

“Beyond” Cubbies

- Church Volunteer Positions
- Community Volunteer Positions
- Employment

(2) **Tickler File**—a small file system containing twelve folders, labeled by month. This holds materials you’ll need on a specific date (invitations, documents for an upcoming trip, tickets to an upcoming event...), and the contents are referenced on your calendar (using a “T” with a circle around it).



(3) **Filing Cabinet**—holds all papers that are reference-only...things like paid bills, warranties, or resources you want to keep that do not need to be reviewed or utilized in the near future. If you'd like an inexpensive alternative, stack your files in banker boxes.



(4) **Future Opportunities**—a magazine holder containing two file folders--one titled "Incubation," with a list inside of ideas you're still considering (possible vacation, a new business idea) and one labeled "Someday," with lists inside of things you DO want to accomplish when the time is right (learn to paint, learn Spanish, and go on a family humanitarian service trip).



STEP-BY-STEP INSTRUCTIONS AND CHECKLIST

Here's a very basic overview including David Allen's Five-Step Process:

Collect, Process, Organize, Review, and Do.

- 1. Carve out some time to “build your system” and create a space that is yours.
- 2. Print out the **M.O.M. Diagram and Summary** plus this checklist for reference.
- 3. Collect or purchase the necessary office items (see next list).
- 4. Identify all your “landing spots” on a list in a folder labeled “Other Inboxes.”
- 5. Build your “machine” (as described above):
 - Things that are “On the Brain”
 - Things that are “On the Brain Only Once a Week”
 - Things that are “Off the Brain”
- 6. **COLLECT** all papers, tasks, and ideas from your physical environment and from your mind into the Main Inbox on your desk (or in a laundry basket, if needed).
- 7. **PROCESS** and **ORGANIZE** each item in the Main Inbox (from the top down) by asking the following questions:
 - **Is an action required?** If yes, move on. If not, you'll either put it in the trash, the filing cabinet, or the Incubation Folder.
 - **Is there a deadline?** If yes, take a moment to mark the appropriate date (and/or memory trigger) on your calendar.
 - **Is this a multi-step task or a single-step task?** Multi-step tasks are placed on a Current Projects List (if they're current) or a Someday List (if they're not).
 - **What is the Next Action?** “What's the very next visible, physical activity that can move this project toward closure?” (You'll write it down once you answer the next question.)
 - **Shall I do this, delegate it, or defer it?** Complete all two-minute tasks immediately, or decide if this is a job for another person or another time. If YOU are going to do this later, write the Next Action on your Immediate or Important list...depending on urgency and context.
 - **Do I have or need any papers or materials to help me accomplish this task?** If yes, file them into the appropriate place: your Current Project Support Materials Cubby, Tickler, Someday Folder, Waiting Folder, or Read/Review Basket.
 - **When will I REVIEW this?** Just think about this for a second—will you look at it when you check your calendar each day? When you see the “Tickler” symbol? When?
 - **When will I DO this?** Make sure you have a clear idea when this is going to happen and that it's recorded or filed in the appropriate spot. Will it be this week? This month? While you're on the computer? Being able to “see” the task getting done helps you know you can trust your system.
- 8. Process and organize the items in your email inbox.
- 9. Commit to checking your calendar and inboxes daily.
- 10. Commit to and schedule a regular weekly review (use your Routines list).

ITEMS TO COLLECT AND/OR PURCHASE

You probably already have much of what you need to build your system, but here's a complete list of everything you'll want for a fully functioning home office. For photos and details, read the additional information below under "Checklist Item #3."

- Calendar
- Stack of plain paper
- File folders (100 is a good start)
- Automatic labeler (if you'd like, but you could also just write neatly on your file folders)
- Basket for Read/Review materials
- Inbox file tray
- Two small file systems (stadium files, portable file boxes, or paper-holding trays—large enough to hold between 6 and 12 folders each)
- Set of cubbies (at least 10)
- Filing cabinet and/or banker boxes
- Magazine holder
- Trash can/recycling bins
- Desk supplies: pens, scissors, paper clips, stapler, tape, rubber bands, and Post-it notes

KEY POINTS TO A SUCCESSFUL WEEKLY REVIEW

This is what you're committing to do each week—it's simple, it's straightforward, and it basically involves reviewing a series of focused lists.

(1) **Fill up your Main Inbox.** Make sure you've gathered every bit of information from your physical environment and from your head. This also includes looking over your calendar—past and future—to see if you need to follow up on or prepare for something important. Many couples find that it's very helpful to do at least this part of their weekly review together. Sit down with your calendars, empty your heads of all ideas, problems, goals, etc., and then incorporate the essential items into your week's plan.

(2) **Review your Current Projects Folder.** Are all of your Current Projects represented on these lists? Are there any that need to be moved to your Someday Folder?

(3) **Identify Your Next Actions.** Check off the things you HAVE done, and then identify the next Next Action that goes with each project you'd like to work on this week and add it to the appropriate list (immediate or important, within a specific context).

(4) **Look at your Routines and Responsibilities Folder.** It's a great idea to review what regularly needs to be done and make any appropriate adjustments.

(5) **Review Your Waiting List.** Maybe you need to follow up with someone who has taken FOREVER to get back to you (that would go onto one of your Next Actions Lists).

(6) **Review Your Goal Review/Personal Lists.** This is a great opportunity to remind yourself what is important to you. It will only take a couple of minutes.

(7) **Look through your email folders.** This is a good time to file things that may not have been filed during the week and review all the "@" folders – especially the "important" and "immediate" ones – to make sure you're up-to-date and that date-specific items have been written on your calendar.

(8) **Look through your "off the brain" materials for new ideas.** This is an opportunity for you to look at your Incubation folder and Someday Folder to see if the things you *want* to do this week will fit with the things you *have* to do.