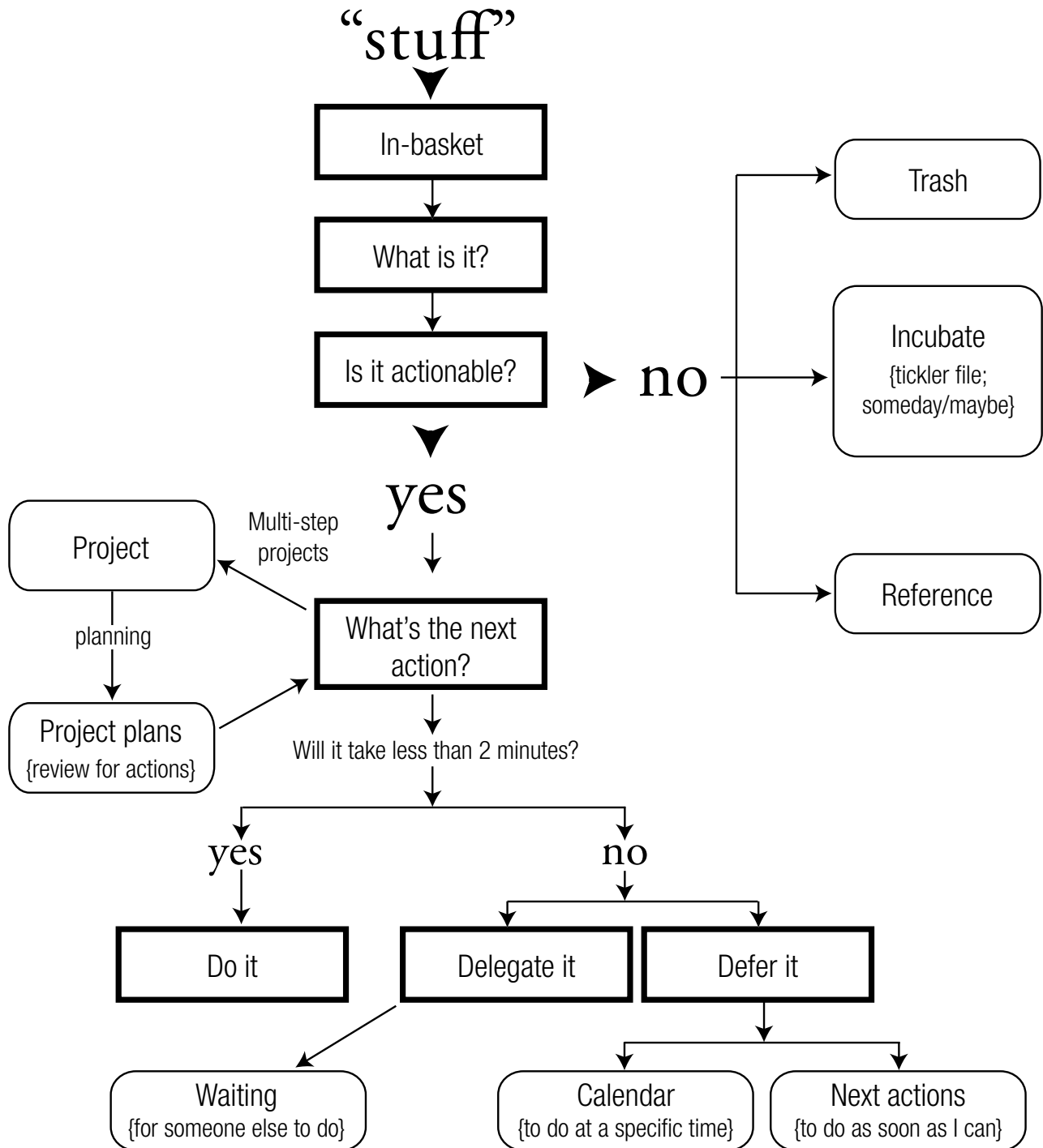


Workflow Diagram



Sample Lists

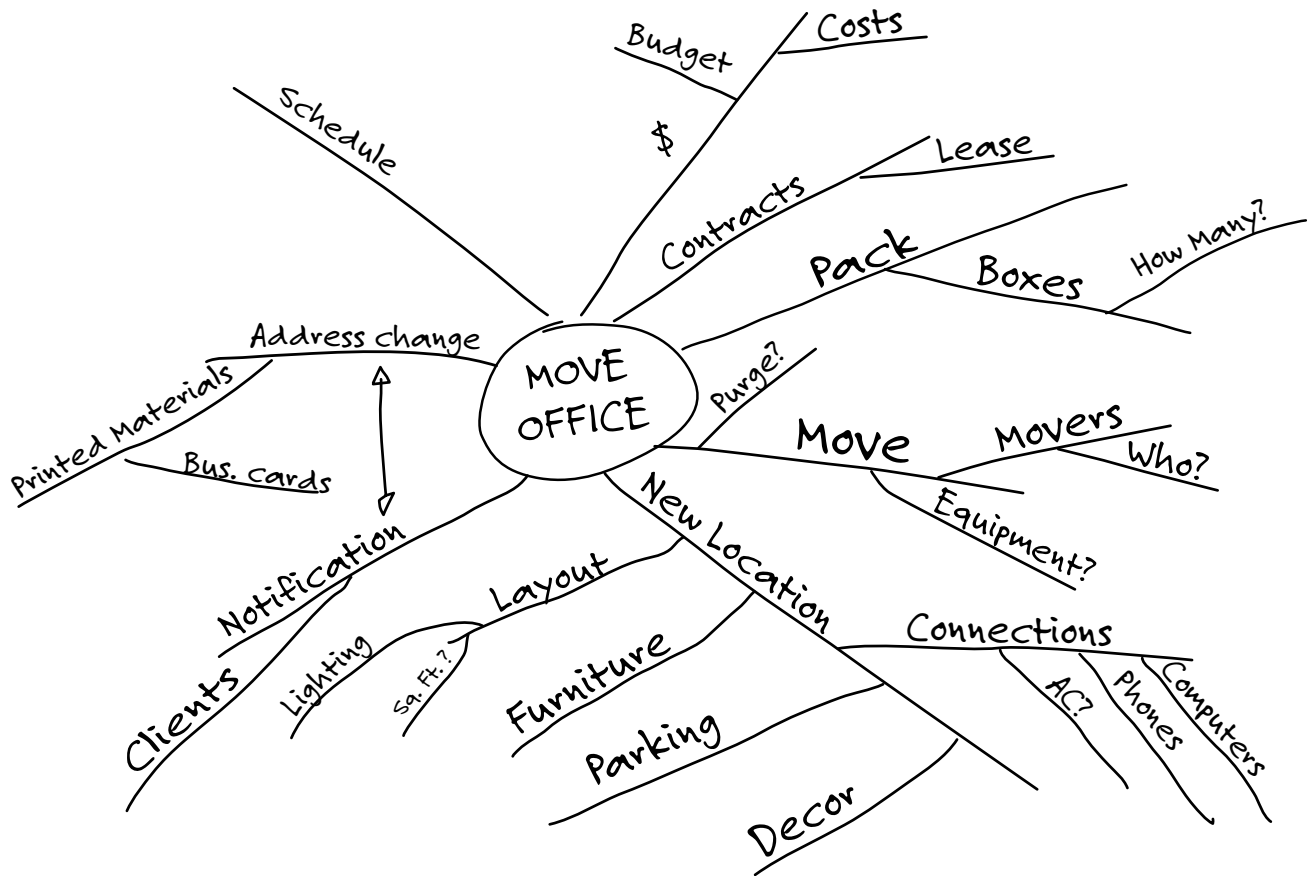
A Partial “Projects” List

Get new staff person on board
August vacation
Staff off-site retreat
Publish book
Finalize computer upgrades
Update will
Finalize budgets
Finalize new product line
Get comfortable with new contact-management software
Get reprints of Fortune article
Get a publicist
Finish new orchard planting
R&D joint-venture video project
Produce new training compact disc
Establish next year’s seminar schedule
Orchestrate a one-hour keynote presentation
Get proficient with videoconferencing access
Finalize employment agreements
Install new backyard lights
Establish formal relationships with South American rep
Finalize staff policies and procedures
Get a new living-room chair

Typical Partial “Someday Maybe” List

Get a bass-fishing boat
Learn Spanish
Take a watercolor class
Get a sideboard for the kitchen
Build a lap pool
Get Kathryn a scooter
Take a balloon ride
Build a wine cellar
Take a trip through Montana
Learn Photoshop software capabilities
Set up a not-for-profit foundation
Create promotional videos of staff
Find Stafford Lyons
Get a digital video camera
Northern Italy trip
Apprentice with my carpenter
Spotlight our artwork
Build a koi pond
Digitize old photos and videos
Have a neighborhood party
Set up remote-server access at home

Mind Map Sample



The Basic Processing Tools

Let's assume you're starting from scratch. In addition to a desktop work space, you'll need:

- Paper-holding trays (at least three)
- A Stack of plain letter-size paper
- A pen/pencil
- Sticky notes (3x3)
- Paper clips
- Binder clips
- A stapler and staples
- Scotch tape
- Rubber bands
- An automatic labeler
- File folders
- A calendar
- Wastebasket/recycling bins

“Incompletion Triggers” List

Professional

Projects started, not completed

Projects that need to be started

“Look into” projects

Commitments/promises to others

boss, partners, colleagues, subordinates, others in organization, other professionals, customers, other organizations

Communications to make/get

calls, emails, voicemails, faxes, letters, memos

Writing to finish/submit

reports, evaluations, reviews, proposals, articles, marketing material, instructions, summaries, minutes, rewrites and edits, status reporting, conversation and communication tracking

Read/review

books, periodicals, articles, printouts, websites, blogs, RSS feeds

Financial

cash, budget, balance sheet, P&L, forecasting, credit line, payables, receivables, petty cash, banks, investors, asset management

Planning/organizing

goals, targets, objectives, business plans, marketing plans, financial plans, upcoming events, presentations, meetings, conferences, travel, vacation

Organization development

org chart, restructuring, lines of authority, job descriptions, facilities, new systems, change initiatives, leadership, succession planning, culture

Administration

legal issues, insurance, personnel, staffing, policies/procedures, training

Marketing/promotion

campaigns, materials, public relations

Administration

legal issues, insurance, personnel, staffing, policies/procedures, training

Staff

hiring, firing, reviews, staff development, communication, morale, feedback, compensation

Systems

phones, computers, software, databases, office equipment, printers, faxes, filing, storage, furniture, fixtures, decorations, supplies, business cards, stationery, personal/electronic organizers

Sales

customers, prospects, leads, sales process, training, relationship building, reporting, relationship tracking, customer service

Meetings

upcoming, need to be set or requested, need to be de-briefed

Waiting for

information, delegated projects/tasks, pieces of projects, replies to communications, responses to proposals, answers to questions, submitted items for response/reimbursement, tickets, external actions needed to happen to continue or complete projects... (decisions, changes, implementations, etc.), things ordered

Professional development

training, seminars, things to learn, things to find out, skills to develop or practice, books to read, research, formal education (licensing, degrees), career research, resume

Wardrobe

professional

“Incompletion Triggers” List

Personal

Projects started, not completed

Projects that need to be started

Projects—other organizations
service, community, volunteer, spiritual organization

Commitments/promises to others
spouse, partner, children, parents, family, friends,
professionals, returnable items

Communications to make/get
calls, emails, faxes, cards, letters, thank-you's

Upcoming events
birthdays, anniversaries, weddings, graduations,
outings, holidays, vacation, travel, dinners, parties,
receptions, cultural events, sporting events

Family
projects/activities with spouse, partner, children,
parents, relatives

Administration
home office supplies, equipment, phones, answering
machines, computers, internet, TV, data backup,
appliances, entertainment, filing, storage, tools

Leisure
books, music, videos, travel, places to visit, people to
visit, web browsing, photography, sports equipment,
hobbies, cooking, recreation

Financial
bills, banks, investments, loans, taxes, budget,
insurance, mortgage, accountants

Legal
wills, trusts, estate, legal affairs

Waiting for
mail order, repairs, reimbursements, loaned items,
information, rsvp's

Home/household
real estate, repairs, construction, remodeling,
landlords, heating and A/C, plumbing, electricity,
roofs, landscaping, driveways, garages, walls, floors,
ceilings, decor, furniture, utilities, appliances, lights
and wiring, kitchen stuff, laundry, places to clear,
cleaning, organizing, storage areas

Health
doctors, dentist, optometrist, specialists, checkups,
diet, food, exercise

Personal development
classes, seminars, education, coaching, career,
creative expressions

Transportation
autos, bikes, motorcycles, maintenance, repair,
commuting, tickets, reservations

Clothes
professional, casual, formal, sports, accessories,
luggage, repairs, tailoring

Pets
health, training, supplies

Errands
hardware store, pharmacy, department stores, bank,
cleaners, stationers, gifts, office supply, groceries

Community
neighborhood, neighbors, service work, schools,
civic involvements

Tickler File Example

