

## GET CLEAR

### COLLECT LOOSE PAPERS AND MATERIALS

Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-tray.

### GET “IN” TO ZERO

Process completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and emails.

### EMPTY YOUR HEAD

Put in writing and process any uncaptured new projects, action items, waiting fors, someday/maybes, etc.

## GET CURRENT

### REVIEW NEXT ACTIONS LISTS

Mark off completed actions. Review for reminders of further action steps to record.

### REVIEW PREVIOUS CALENDAR DATA

Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.

### REVIEW UPCOMING CALENDAR

Review upcoming calendar events—long and short term. Capture actions triggered.

### REVIEW WAITING FOR LIST

Record appropriate actions for any needed follow-up. Check off received ones.

### REVIEW PROJECT (AND LARGER OUTCOME) LISTS

Evaluate status of projects, goals, and outcomes, one by one, ensuring at least one current next action item on each. Browse through project plans, support material, and any other work-in-progress material to trigger new actions, completions, waiting fors, etc.

### REVIEW ANY RELEVANT CHECKLISTS

Use as a trigger for any new actions.

## GET CREATIVE

### REVIEW SOMEDAY/MAYBE LIST

Review for any projects or actions which may now have become active, and transfer to the appropriate list. Delete items no longer of interest.

### BE CREATIVE & COURAGEOUS

Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system?