

Quick Guide Day 1-5



Personal Workflow
Do more & Work less

Introduction

Become more resourceful

This guide will help you to get up to date with all your unfinished tasks. Getting up to date with your tasks does not mean that you have to complete all the tasks but it means that you have to clarify what is going to happen with the unfinished tasks. Clarifying what is going to happen with unfinished tasks will lead you to a feeling of being more resourceful because you are in control of your tasks.

We have made this implementation guide for you in order to make it easier for you to get started on improving your workflow by implementing the principles one step at a time. What we suggest in this guide can be done without the permission of anyone, which makes it easier for you to get started. We have developed a method, which has helped a lot of people around the world, including ourselves, and based on the results we have created for people we are confident that our method works.

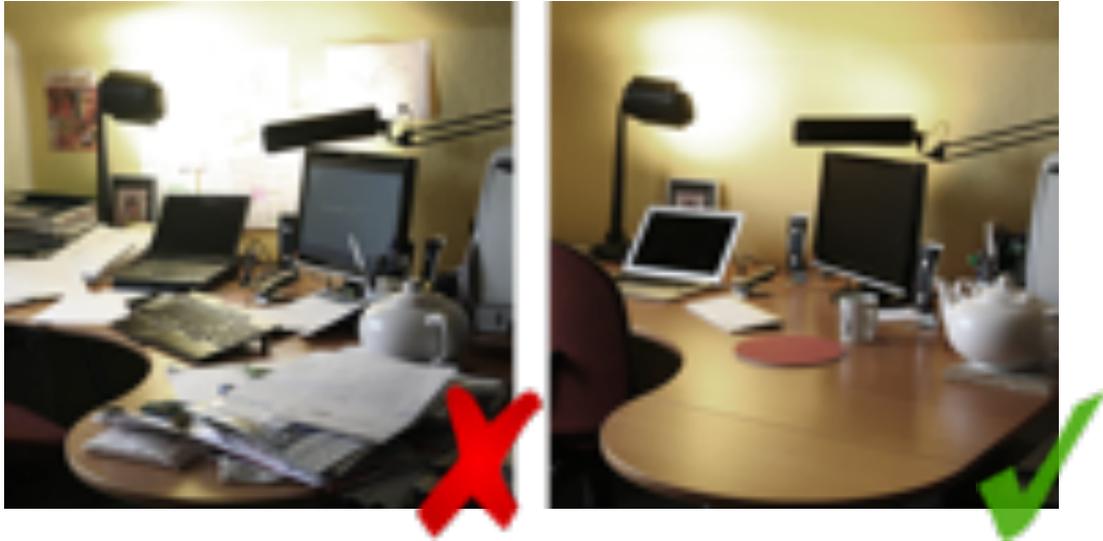
Going from bad to good conscious

This guide emphasizes the process of the first 5 days in working with your personal workflow.

The majority of people feel that the first step in the process is the hardest. For that reason our reaction as humans is to collect more and more knowledge before starting the process and initiating change. Our aim was never to write a comprehensive book about all the workflow principles. Rather, our aim was to write an easy understandable guide, which can help you to take the first step and starting changing your bad conscious, frustrations, and worries into a more positive mental state.

If you spend some time to practice implementing some of the principles in this guide you will achieve results in the short term. Start right now and soon you will be able to do more and work less.

1. Desktop



Your desk is often the best place to start because a tidy and manageable desk can immediately result in increased efficiency and improve workflow. Focus is the most important resource we have available. If you have post-it notes, paper or stacks of paper on your desk reminding you what tasks to do you are on your way spreading your focus. The worst thing is that, even though we are not conscious about it, our brain constantly scans the desk and wastes our focus. When you have a tidy desk you will experience:

- It is easier to stay focused
- It is easier to go in-depth with a task
- It is easier to clean
- You spend less resources on solving the task

Tidying the desk is an easy task, which can be done in short time. You will experience that you have a better focus and the opportunity to achieve more in less time.

You have to have a critical approach to tidying your desk. Your task is to remove all the things that do not belong on the desk. Paper, cups and pens that do not work have to be removed with all the other small things that waste your focus.

1. Desktop

Make sure you keep the things on the table that you associate with something positive. An example could be a picture of your kids, a flower of something alike.

When you clean the desk you will find pieces of paper that cannot be trashed but you do not have anywhere to put it either. Your next decision you have to make is where your work documents can be put. Do you have a filing system? Should you perhaps get one?

Documents can be used for two things: to solve a task or as referencing for later use. If the documents have to be used to solve a task it would be a good idea to have a sorting file or a tray system. The acid test is that your papers cannot be used as a reminder of what you have to do but the tasks themselves are listed on some sort of task list. We recommend that you create a physical archiving system where you can save all the documents you don't want to use right now but possibly have to be used in the future. The papers which do not have to be used in the future are trashed.

When you do this the right way the following will happen:

- The only paper allowed on the table is for the next task
- You only have things on the desk that gives you positive thoughts

When you have your desk tidy you will have more mental resources contributing to completing more tasks and working less hours.

Idea!

Take a before and after picture. Give yourself a reward when you have had a tidy desk for 5 days. Email the pictures to us so we can see your progress. Use the pictures to remind you how a desk should look like.

Make sure to remember what it feels like having a tidy desk because that feeling makes you want to keep it tidy.

2. Physical inbox



By now your desk should be under control. Next, is to set up a system that can prevent your desk from being a mess again. A physical inbox is where you can park documents temporarily. Whenever you have some spare time you go through the papers and empty the tray. When you have an inbox you can prevent stacking paper on the desktop and you have created a space where your colleagues can leave papers for you. We recommend that you get a regular tray as shown above. Your inbox can be used for two things and will solve many of your efficiency challenges:

- It can be used for your own non-clarified papers
- It can be used for others to leave papers for you to see

You should perceive your inbox as temporary parking for the documents, which has to be evaluated and need to be addressed. If you have a good idea but do not have the resources to finalize the thoughts then write a small note and put it in your inbox. When your colleague stops by with a paper, which you cannot allocate resources to at that moment then ask him to leave the paper in the tray.

By now you have collected all the documents for future evaluation in one place. No interruptions and no unnecessary shifts in focus. You are on top of things.

2. Physical inbox

When your documents and papers are organized you free up some mental resources you can use to intensify your focus on the task at hand. This is the way to do more and work less. By now you have a functional physical inbox but how do you work with the documents from here?

As we recommended before the best option is to establish an archive. You decide yourself how complicated the archive has to be. Maybe you want to archive all the papers the same place. Maybe you want to archive the papers based on categories or something else. What you have to do is consider if there is a task in the document. If the document has a task in it you write down the task on a piece of paper (or electronically) and then you archive the paper in your newly established archive. Now, it is not the paper that reminds you of what has to be done but a note written somewhere you will definitely look again. We will return to the task list a bit later in this guide.

When it is the task lists rather than stacks of paper that reminds you of what to do you will experience more mental resources because you feel like being on top of things and you have made a conscious choice where your tasks are located.

Idea!

You can leave a note with compliments, a motivational quote or another reward in your physical inbox. By the time you empty your physical inbox you will have that little motivating present. You can do this to other colleagues as well.

3. Electronic inbox

By now we are in control of everything that visually take up your focus. Your desk is manageable and your physical inbox ensure that there always is a space to park temporary documents avoiding paper stacking up on your desk. When you do this you allow yourself to allocate 100% of your focus to the task at hand instead of wasting your focus.



You probably receive a lot of emails during the day. Have you noticed that receive more emails today than you did 3 years ago? Would your current way of handling emails be able to handle the increased number of mails in the future? Is it realistic that you are able to handle twice as many emails as you do today? Having a messy electronic inbox does the same to your focus as a messy desk.



We recommend that you try to get your electronic inbox down to zero mails. I recognize that it can be quite a task but it contributes to increasing your mental resources. Believe us it is worth it. You can compare the electronic inbox to your physical one: the only emails allowed to be in the inbox are the ones temporarily parked until you chose what is going to happen with them. All other mails have to be archived.

3. Electronic inbox

What you have to do now is tidying your current inbox. Based on experience there is a big risk that you are using your electronic inbox wrong, which can contribute to spreading your focus.

We recommend that you create two subfolders in your mail client. Name the first subfolder “Active” and name the other subfolder “Archive”. If you add a “@” by both subfolders: “@Active” and “@Archive” the folders will be placed at the top of your list of folders and create a better overview. Try to do that now.

Now you have to go through the inbox and check if there are any emails that have a task in it for you to complete. All the emails, which remind you of a task that has to be done, you park in the subfolder “@Active”. Now you have gathered all your active emails, which contain a task for you to look at. Move the rest of the emails from your inbox to the subfolder “@Archive”. The archive works like the physical archive you made earlier on. The archive folder is where you keep the electronic documents and emails you have to use again in the future.

We recommend you to sit down for an hour and work through the “@Active” folder. Consider what the task is, write it on your task list and move the specific email from “@Active” to “@Archive”. You can delete the subfolder “@Active” when you are done. From now on, when you receive an email you put the task on the task list and move the email from the inbox to “@Archive”.

Idea!

You can always use the search function to find the emails you have put in your “@Archive” folder.

4. Task list



The task list is the most important aspect to work with when you want to improve your workflow. When you have a good way to handle your task list you will notice significant improvements in your way of working, get more mental energy and have the possibility to have weekend with a good conscious free of worry.

The human brain is incredible at being creative, solving tasks and come up with new ideas. Unfortunately, it is bad at remembering things. For that reason it is important that every time you have to remember something you write it down on your task list immediately.

When you review your physical and electronic inbox you will see that some of the documents or emails has a task to be done. It is important that it is the task list and not the documents reminding you what to do. When you see a document containing a task you write it down on your task list and archive the document either physically or electronically. If you do this you have all your tasks gathered one place. You are 100% sure that you won't forget any tasks because you have all tasks gathered in one place instead of having tasks all over your desk and email.

By doing this you will get a certainty that you won't forget anything because you have a system that contains all the tasks you have been given by others or yourself. The increased certainty will contribute to a better focus.

4. Task list

Paper or electronic list?

You have to decide where you want to have your task list. You can choose a paper or electronic version. Both of the options have cons and pros. The paper version is easier to bring about, can give the feeling of more security, mind dumping can be done faster and it is more accessible than the electronic list. However, it takes more time to maintain a paper list because you have to rewrite tasks often. The electronic version is good because it is easy to edit and move your tasks around men often require that you are somewhere specific and online. However, the principles are the same no matter what you choose.

Outlook as task list

If you use Outlook at work we recommend using the assigned task list in Outlook. You can create different categories in Outlook. You need **at least** 2 categories, which is the week list and future list. In case you feel the need for it, you can create a day list as well. Not everyone needs the day list. The advantage of having 3 lists is that you can easily prioritize between ad-hoc tasks and the other tasks just by looking at the day list. As a rule of thumb you should put no more than 3 tasks on the day list. When you are done with the 3 tasks you go to the week list and see which tasks are going to be completed next.

Write your tasks into the task list and start sorting. Put the tasks that you have to start on this week on the week list. The tasks that has to be started today is put on the day list. Put the rest of the tasks on the future list. Now, you have a system where you have prioritized all your tasks and now you can start working.

Idea!

The task list can also contain other contexts like “waiting for”, “boss” or “call”

5. Calendar

The calendar makes you proactive

By now you should have a more manageable inbox both electronically and physically. You have organized all your tasks in your task list and sorted them into the categories: “Day list”, “Week list”, and “Future list”. You already have a system, which can contribute to a positive mental state and a better focus to complete your tasks. The calendar is the last part you have to manage in order to improve your workflow. When you have a task list and a calendar you trust you will experience a calm approach to your tasks because you are 100% sure that you are on top of things and nothing is forgotten.



Deadlines and appointments

The first thing you have to decide is where you want your deadlines and appointments to be. Gmail and Outlook have an integrated calendar. If you use either Outlook or Gmail as your mail client we recommend using their calendar as well for simplicity. When you are going through your inbox – both the physical and electronic one – and you see a task, which has a deadline we advise you to put it in the calendar. Remember not to put deadlines on all your tasks. If everything has a deadline – nothing has a deadline.

Idea!

Start outlook in “calendar” instead of “mail”. If you do this you ensure that you decide what to work on instead of being dragged into tasks other people want you to work on.

6. Do more and work less

By now you should have a decent system and you have worked your way through the first week. You have already improved your workflow and it is important that you practice the processes again and again to maintain an efficient system. What you have to do next is:

1. Empty your mind
2. Collect all tasks one place
3. Break down your tasks to next actions

If you make sure to empty your mind regularly, collect all your tasks in one place and break down your tasks to next actions you will experience a more calm and resourceful state of mind. By doing this you can have a weekend with a good conscious.

Do you want to know more?

You are always welcome to send us an email if you have questions regarding the implementation of the principles and advice we have covered throughout the course and this guide. We are specialists in this field and we have helped many people improving their work patterns.

We sincerely hope you have got a better understanding for personal efficiency.

Good luck...



5. Personal Workflow



Personal Workflow (PW) is a consulting company educating managers and employees in creating a better work experience in the organization. We help you to re-think the way you work and make your work day easier and more enjoyable.

Contact us today

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