Improve your personal Productivity

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About Me

Three decades in leadership spanning R&D, Sales, and Product Management

Passion for coaching and mentoring

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Goals of This Session

- Improve your personal productivity

- Increase your responsiveness and personal accountability

- Reduce your stress by organizing your workload

Why This Matters

- Out of control email is one of the most common signs of *overwhelm*

- Personal accountability is a hallmark of high performers

- Reliability and dependability are highly valued at all levels of the organization

- No one likes having to follow-up on something

Why This Works

- Productivity is a personal passion for me
- Proven techniques are drawn from *Getting Things Done* by David Allen
- Consistent results
  - 50% see dramatic productivity gains
  - 25% see modest gains
  - 25% say "this isn't for me"

Core Elements for High Productivity

- Ritualistic Planning

- Aggressive Calendar Management

- Email Mastery

- Systematic Note-Taking

- A Single Centralized Tasklist

- Distraction Elimination

Today's Focus

PLANNING CHALLENGES

Use a Daily Planning Ritual to Organize and Prioritize

- Plan every single day – make it a ritual

- Triage distractions/impediments

- Choose your highlight

- Prioritize/plan your day

- Follow your plan

A Suggested Daily Planning Ritual

- Remove all distractions
- Consolidate tasks from all sources
- Review waiting email folder
- Review calendar for the day, identify prep tasks
- Sweep through email inbox
- Revise/prioritize task list
- Set goals for the day/Choose your highlight
- Deal with the critical emails
- Proceed with the day

Establishing Your Planning Ritual

- What time of day would work best for you?
  - First thing in the morning?
  - At the end of the workday?
  - In the evening before bed?
- How much time do you need?
  - I typically need 10-15 minutes
  - When pressed for time I have a quick version that takes 5
- What's your backup plan when that doesn't work?

Pro Tip – Use a Checklist App

iPhone – Checklist – Perfect Checklist
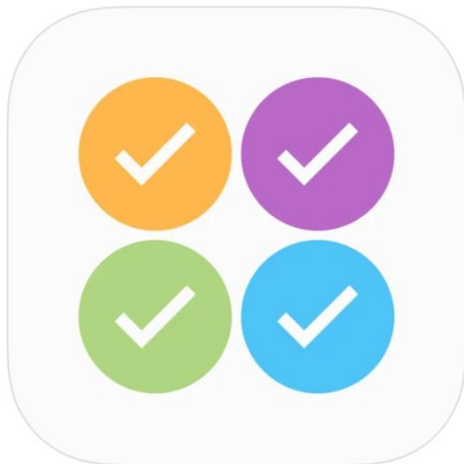
Checklist - Perfec
Simple and Easy to Use
Koji Ito
Designed for iPhone

★★★★ 4.7 • 1.6K Ratings

Free · Offers In-App Purchases

Download

Android – Check Off

Check Off - Reusable che
made easy

Dave O'Brien   Productivity

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EMAIL CHALLENGES

Email Management Proven Practices

- Keep your inbox clean – "zero inbox"
- All emails are not equal – prioritize
  - Use labels to prioritize what needs action
  - File everything else
- Resist the urge to respond immediately
- Build the habit of cleaning your inbox every time you work email

Suggested Email Labels

ACTIONABLE

- 10 Now
- 15 Today
- 20 This Week
- 25 Someday
- 30 Waiting
- 40 Stuff
- 50 Read
- 55 Alerts

STORAGE

- 60 File Cabinet
- 70 Customers
- 80 Vendors
- 90 People

Labels prefixed with numbers to sort them in the proper order

The Actionable Labels

- 10 Now – The fires
- 15 Today – Should respond by end of day
- 20 This Week – Should respond by end of week
- 25 Someday – You'll never respond but you feel guilty
- 40 Stuff – Stuff to keep at your fingertips
- 50 Read – Things to read when you have time
- 55 Alerts – Low priority alert emails. Skip the inbox and scan quickly when time permits

The Waiting Folder

- Are you confident you will get a response?
- If not, save the sent email in the Waiting folder
- Review Waiting folder daily

Saving to Waiting

- After sending
  - Dialog box appears in lower left
  - Click View message
  - Click Labels icon
  - Select Waiting label
- Alternatively
  - Click on Sent
  - Find sent email
  - Follow same process
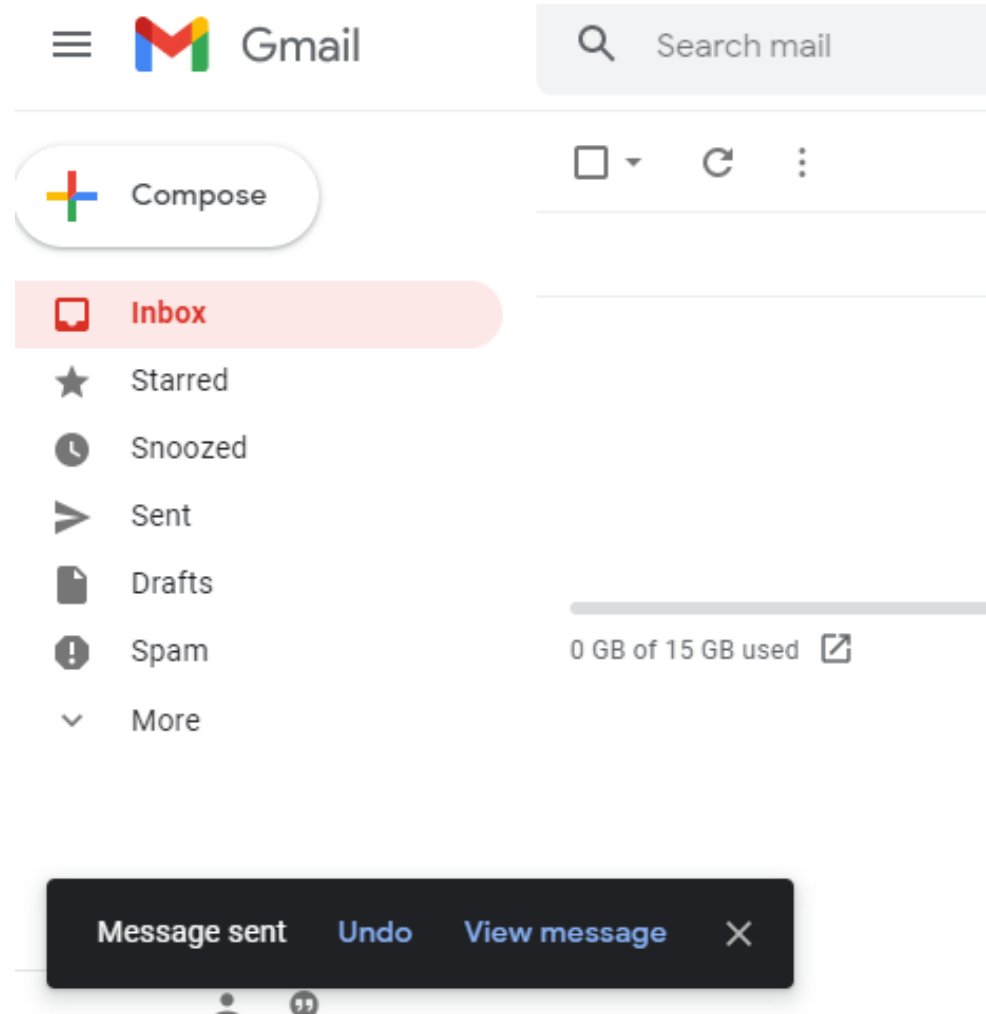
Archiving

- Gmail search is so powerful, you don't need to label your emails
- If you don't want to delete it, archive it
- It will still be available in All Mail
- It will still be available in search

Storage Labels

- Use whatever system works for you. Keep it simple.
- 10 File Cabinet
  - For everything other than customers, vendors and people
- 20 Customers
  - Child label for each customer
- 30 Vendors
  - Child label for each vendor
- 40 People
  - Child label for each person (typically colleagues, not customers, most relevant for people managers)

The Inbox Sweep

- Scan email briefly
- Respond or act if you can do so in 60 seconds or less
- Otherwise move to Now, Today, This Week, Someday
- Ignore all fires until the sweep is done

Getting Started – Clean Out Your Inbox

- Move everything from the past 48 hours to Now
- Move everything from the past week to Today
- Move everything from the past month to This Week
- Archive everything else
- If archiving makes you nervous, move everything else to Someday
- Maintain zero inbox
- Work down Now, then Today, then This Week backlogs

What Gets Measured Gets Done

- Track your progress daily until it's a habit

- Capture daily after your morning sweep

- Find a partner to hold you accountable

- Tracking tip – Gmail
  - Click on label.
  - Gmail shows total number of emails in upper-right hand corner

Date	Inbox	Now	Today	This Week	Total
6/1/2021	5,227	0	0	0	5,227
6/2/2021	300	5	20	100	425
6/3/2021	200	4	17	105	326
6/4/2021					

Email Tracking Template
http://shorturl.at/KOU57

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Working Your Email Backlog

- Identify patterns
  - Filter by sender to see who emails a lot
  - Identify email lists, email alerts
- Create Filters
  - With email open, click three dots, choose "Filter Messages Like This"
  - Enter criteria (Usually From or Subject)
  - Click create filter
  - Skip Inbox and Apply a Label
  - Skip Inbox and Delete
- Report Spam to get it out of your Inbox

Example Email Filters

- From: Box Sync Alerts. Skip Inbox and Apply "Alerts" label
- From: Chronicle of Higher Education. Skip Inbox and Apply "Read" label
- Subject: Declined: Skip Inbox and Apply "Alerts" label
- Subject: Accepted: Skip Inbox and Apply "Alerts" label

Additional Tips

- Think before you choose "Reply All"
- Move things to Slack (or Teams or whatever you use)
- Stop unwanted emails - unsubscribe
- Get comfortable with search. It's incredibly powerful
- Know when you're in a rut and change it up
- Leverage your mobile device
  - A quick sweep brings peace of mind that there are no fires
- Vacation Responder – set it to turn off automatically

Suggested Reading

- [Getting Things Done](#) – David Allen
- [Make Time](#) – Jake Knapp & John Zeratsky

Summary

- Ritualistic Planning – Plan daily
- Aggressive Calendar Management
- Email Mastery – Establish a zero-inbox methodology
- Systematic Note-Taking
- A Single Centralized Tasklist
- Distraction Elimination

ADVANCED TIPS

Label Visibility

- Set actionable labels to always show
- Set other labels to show if unread

Other Gmail Tips

- I've had problems moving more than 50 emails at a time
- If you select everything and archive it or apply a label and it doesn't appear to work, just do one page of messages at a time

❓ Questions

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Bonus Material – Weekly Review

My Weekly Review

- Clear inbox
- Clear backpack
- Review waiting email
- Review waiting tasks
- Review next week's calendar and identify prep tasks
- Update home calendar

- Review projects tasks
- Review values diagram
- Review home tasks
- Build weekend tasklist
- What should be projects but aren't?
- Review someday email folder
- Review someday tasks