Collecting
- Developing a seamless Collecting System
- Clearing the mind – capturing commitments and communications in the To-Do List
- Learning how to manage interruptions effectively

Processing and Organizing
- Setting up Planning & Action Categories in your To-Do List
- Emptying Categories: (none) using the McGhee Workflow Model
- Improving your Reference System
- E-mails that get results – using the McGhee PASS model
- Emptying the inbox – using the Four Ds For Decision Making

Prioritizing and Planning
- Are you planning from a Calendar or a To-Do List?
- Setting up your Baseline Calendar
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Planning Categories

- Meaningful Objectives – Business
- Meaningful Objectives – Personal
- Supporting Projects – Business
- Supporting Projects – Personal
1:1 _______ (boss, direct reports, family)
1:1 Team (if more than 7 direct reports)
1:2 _______ Staff Meeting (quarterly, monthly, weekly)

Action Categories

SNA Calls
SNA Computer
SNA Desk
SNA Errands
SNA Home
SNA Online
SNA E-mail
SNA Read
SNA Waiting For
Someday Maybe
The Workflow Model

The Four Ds for Decision Making

1. Delete it
   - If it does not relate to a Meaningful Objective
   - If you can find it somewhere else
   - If you will not refer to it in 3-6 months and it's not legal or HR

2. Do it (if less than two minutes)
   - Respond and/or file

3. Delegate it
   - Send delegation
   - If follow-up is required, track it in a 1:1 or SNA Waiting For category

4. Defer it
   - Transfer to a 1:1, SNA category or a specific time on your calendar

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Delegate it
- Send delegation
- If follow-up is required, track it in a 1:1 or SNA Waiting For category

Defer it
- Transfer to a 1:1, SNA Category or a specific time on your calendar
Example: Please review the proposal and send me your input by October 1.

Examp
e: Action Requested: Review revised Clayden proposal and
provide input by October 1.

Example: I’d like your approval on the Clayden proposal.

Does your e-mail content PASS?

Subject Line
Has the communication been effectively summarized in the Subject line?

Supporting Information
What supporting information does the recipient need?

To Line:
Responsible for the action on the subject line

Cc Line:
Not responsible for any action on the subject line

Does your e-mail content PASS?

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• Review Meaningful Supporting Projects, courses, connections
• Capture course content in your IMS
• Prioritize remaining SNA and/or plan SNA calendar time

The Weekly Review

1. Getting Your IMS Current
   • In Outlook Tasks:
     - Capture incomplete actions in the Task List
     - Categorize items in the Task List

2. Reviewing Your Planning Categories
   • Prioritize remaining SNA and/or plan SNA calendar time

3. Prioritizing Your Action Categories
   • Clear your mind
   • Capture incomplete actions from your winging
   • Categorize items in the Task List

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Phone: (866) 400-9948
The Meeting Request Model

1. Does this impact one of my Meaningful Objectives?
   - Yes → Request Information: 
     - Attendees?
     - Location?
     - Due Date?
     - Length?
   - No → Delete it

2. Do I have all of the information I need?
   - Yes → Request Information: 
     - Attendees?
     - Location?
     - Due Date?
     - Length?
   - No → Can I delegate it?

3. Can I delegate it?
   - Yes → Send an E-mail using PASS Model
   - No → Can I add it to an existing meeting agenda?

4. Can I add it to an existing meeting agenda?
   - Yes → Add to Agenda
   - No → Calendar it

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Do You Have ALL The Information You Need?
It is much easier to prioritize meeting requests when you have the information available.

Make sure that you find out:

• What is the agenda?
• Who is attending?
• Is any supporting information required?
• What is the location and length of the meeting?
• What is the date by when the meeting needs to happen?