

Getting First Things Done

The time management methodology
behind WeekPlan



Hi,

I am Aymeric, I am the creator of WeekPlan.

To me, time is the most important resource I have. I will die one day and each moment that passes, I can't get it back.



Not only do I have a limited amount of time to live with, I also have a lot on my plate. Before WeekPlan was born, I had a full time job as a software development consultant, on the side (meaning, first thing in the morning, late at night, and during the weekends) I was managing Facebook apps that had millions of users and I was involved in non-work activities that I wanted to do to stay sane too.

Every single thing I was doing had to be prioritised against other activities that were also important.

I needed to find a solution to help me cope with the workload.

Contents

How WeekPlan was born	4
The importance of the Quadrant II	5
Making time for Quadrant II activities.....	6
Quadrant IV	6
Trade time with money	6
Automate and simplify	7
Solve problems only once.....	7
Initial setup.....	8
Braindump.....	8
Be clear with your vision	11
Becoming a Quadrant II self-manager.....	15
Weekly reviews.....	15
Inbox processing	18
Daily reviews	22
1. Review of the existing tasks	22
2. Review of the <i>Waiting for / Blocked</i> list.....	22
3. Promotions from Parking lot	23
Execution or lack of.	23

How WeekPlan was born

At the peak of this hectic period, I looked at various time management solutions. I used "Getting Things Done" for almost a year, reading blogs about it, trying all sorts of software, but ultimately I realized something fundamental: most time management systems are good at helping store the tasks I need to do, but they suck at motivating me to do them, and they suck at helping figure out which tasks are most important. GTD was good at making me tick the next action off my todo list but I was realizing I was spending my time on the wrong things.

*It doesn't matter how fast you drive
if you are heading to the wrong direction.*

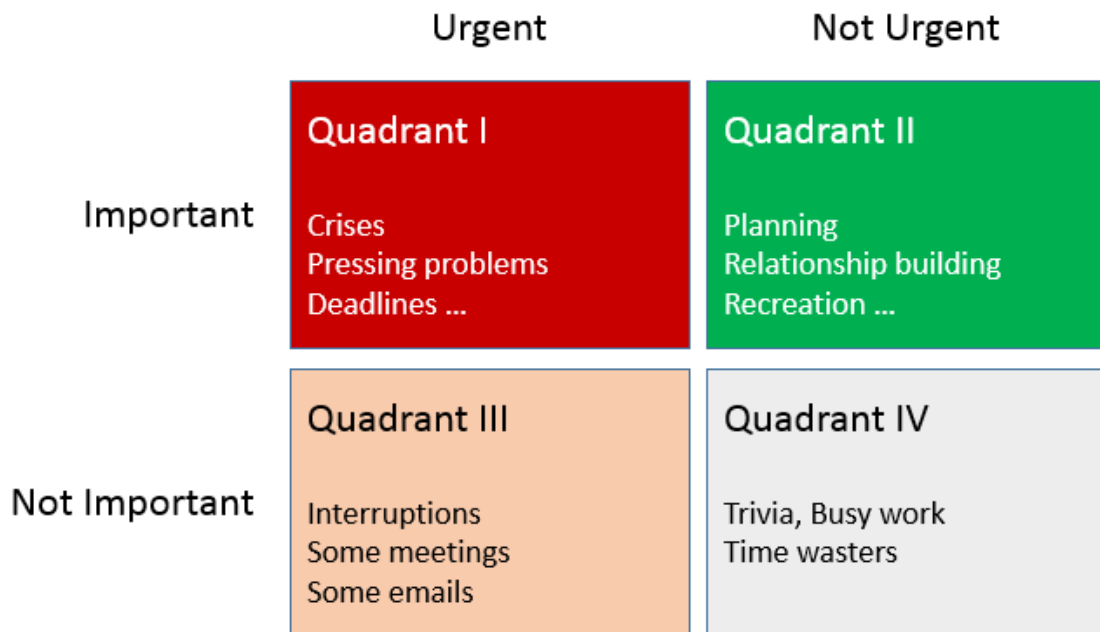


So I wrote the first version of WeekPlan after reading books about effectiveness because working on the right things (being effective) is more important than doing a lot of stuff (being productive).

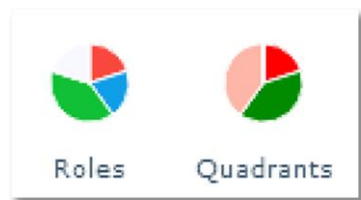
WeekPlan is a simple methodology to help us stay connected to our goals and vision.

The importance of the Quadrant II

What quadrant is most dominant in your life?



WeekPlan (software) allows you to mark tasks as important and/or urgent. By the end of the week, you can clearly see where you spent most of your time.



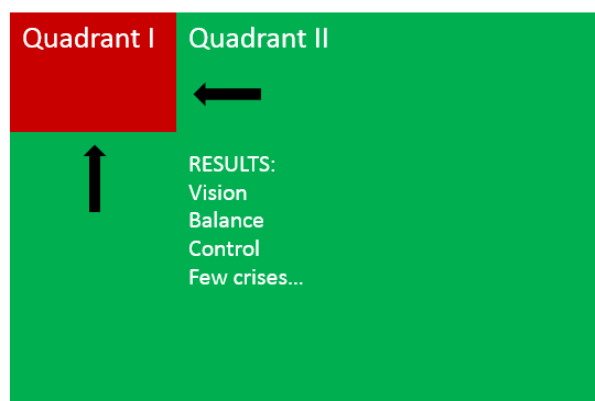
Screenshot from the app

Most people feel they live in the Quadrant I, constantly putting out fires, and solving problems that require immediate attention.

To win at the time management game, you need to reduce urgency in your life and focus on importance.

By taking every opportunity possible to spend time in a Quadrant II activity, you will reduce, overtime, the time you spend in urgent tasks.

Quadrant II is about problem prevention, relationship building, planning, rest, etc...



If you maintain your car regularly (or any equipment or relationship really), you are less likely to have to deal with major breakdowns (they seem to happen at the worst time or all at the same time).

The first question people ask me when I tell them about the Quadrant II is: "Aymeric, I understand the concept behind the Quadrant II and I like it, but I don't have any time left to spend time in the Quadrant II at all, I am drowning under all these Quadrant I and Quadrant III tasks".

Unless you are a very exceptional case, there is probably some room for Quadrant II tasks in your schedule.

Making time for Quadrant II activities

Quadrant IV

Let's start with the most obvious: get rid of your TV. People complain that they have no time and yet they still own a TV. A TV is too easily turned into a bad habit. It usually sits in the middle of the house and there is always something to distract us.

Don't have a TV? Well done. Any Quadrant IV is a great candidate: uninstall your games, remove anything that make you waste time.

Trade time with money

You can buy some time to use in Quadrant II activities. Hire people who are specialists in their field rather than do the stuff yourself.

For example, consider hiring a house cleaner. Consider delivering your groceries at home.

Automate and simplify

Automate what doesn't need you to make a decision.

For example, automate the payment of your bills. Automate how you sort your emails. Unsubscribe to the newsletters you consistently not read. Etc...

Solve problems only once

Whenever you have to deal with something, solve it in a way that will prevent it to come back, ever. Forgot to pay your bills again? Automate them, or set up reminders.

Had some issues with a co-worker because of some misunderstanding? Agree on a new procedure that will make sure you are both on the same page for the rest of your work relationship together.

Etc...

So hopefully you have found some time to spend in Quadrant II activities. Let's use some of it in setting up your new time management system.

Initial setup

Braindump

The first thing I recommend you do when starting with the WeekPlan methodology, is to take an hour aside to do a braindump.

The concept of a braindump was made popular by the book "Getting Things Done" where the author suggests that your mind is a very poor task storage.

Not only is it hard to prioritise what is in your mind, you may be forgetting things too. The way your mind tries to help is by constantly reminding you about the things you should be doing ("I should call Mum", "I need to pay the bill", etc...).

By dumping all the tasks you store in your mind into a system you trust, your mind will stop bugging you.

Busy mind

Remember to
send the letter


Call dad

When was the last time
I saw Harry?

I should tidy up my desk

Did I receive the check?

I have the feeling
there is a birthday coming this week



After brain dump

Remember to
review the list



THE LIST

Call dad
Send the letter
Verify I received the
check
Organize a catch up
with Harry
Marilyn's birthday
Tidy up desk



Although you don't have to use WeekPlan (the software) to implement WeekPlan (the methodology), it is obviously easier. Use the Parking Lot in WeekPlan (software) for this activity.

Activity 1 - Braindump

So, in this activity, the objective is to write all the tasks you need to do, you would like to do, and you might do some day. Anything and everything, do not filter anything out. Maybe one task will remind you of something more important.

Here is a guideline to help you find the tasks that you should write down:

Dump everything work related: all the reports, all the calls you need to make, all the emails you need to answer, all the documentation you need to write, etc...

Dump everything house related: cleaning, shopping, repairing, etc...

Dump everything related to your family: keeping in touch, gifts, etc...

Dump everything related to your health: appointment with doctor / dentist, gym, trying this new sport class, etc...

Dump everything related to your friends: Gifts, events you should organize, etc...

Dump everything related to your hobbies: Things to buy, things to do, things to read, etc...

Dump everything related to your dreams: bucket list, dreams, etc...

I have more than 400 items in all my parking lots so it is important for me to realize that I will never do them all. There is no need to stress about the quantity of tasks you have in your parking lot. This is where prioritization will be essential to figure out what should be worked on.

Be clear with your vision

*To know what to do next to get somewhere,
you need to know where you want to go.*

Before I introduce you to this habit, I would like to suggest a new activity. We will reuse the result of this activity throughout the rest of the methodology.

WeekPlan encourages you to think to segment your life into roles and to manage your goals and tasks according to them.

Here is a list of roles you may have:

- Father / Mother
- Sister / Brother
- Family (more general)
- Friend
- Lover / Wife / Husband / Girlfriend / Boyfriend
- Colleague
- Association member
- Etc...

One special role that people tend to forget is you as an individual. I call it the "Self" role. This is where you put things you do to improve and feel better.

To think your life in terms of roles will help you figure out your goals.

Activity II - Roles

Write the list of all the roles you have in your life.

Visualizing the end

Imagine that you are at the funeral of a very close friend. (Try to visualize this story in your head)

As you walk towards the open coffin to see your friend one last time, you take notice that your friends and family are here too.

As you arrive at the coffin, you realize that it is you in the coffin. You are at your own funeral.

Activity III – Visualize the end

Imagine, what would you like your family to say about you? What do you want to be remembered for?

What would you like your friends to remember about you? Your colleagues? Etc...

Take the time to really hear what they have to say about you to the rest of your family and friends.

For each of your roles, write down what you would like them to say.

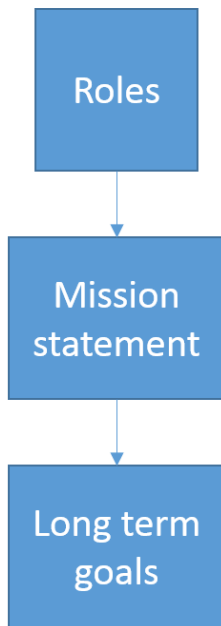
Visualizing your end goal helps you clarify where you want to go. You can do it with your life, but also with any project. What does "done" mean?

It also allows you to reconnect with your values and long term goals.



In WeekPlan (software), you have a module called "Vision tracker" where you can write down your mission statement, values and long term goals.

I like to use the answer to the funeral question as my mission statement.



WeekPlan is about taking a top-down approach to time management.

You start with your high level vision and work your way down to your day to day tasks.

This is why WeekPlan is better at making you live a more meaningful life.

Activity IV – Long term goals

Based on your mission statement, for each of your roles, list out the long term goals you would like to achieve.

It could be something like:

Self

I want to be financially independent

I want to be able to sing in tune

Family

I want to help my family be financially secure.

Etc...

Some people find it hard to clarify their vision because it is not a clear step by step process. It requires you to really take the time to think about it and reconnect with what matters most.

I remember that when my parents broke up, my mother had a period where she didn't know what she wanted to do with her life. She had spent

so many years caring for others, her children and husband, that she had forgotten her own dreams. Slowly she started finding interest in new activities, and started traveling the world.

"Begin with the end in mind" can take a while but I recommend starting now and reviewing it later. It is not set in stone.

A great moment to review your mission statement and long term goals is when you are in holidays, because you have plenty of time to think. (Don't wait to be in holidays to start though, get the thought process going now.)

Becoming a Quadrant II self-manager

We have seen how to use your personal leadership to figure out your personal vision (figure out what the right things are). Now we will tap in the manager in you (do things right) to implement the WeekPlan methodology on a weekly basis and on an ongoing basis.

Weekly reviews

The weekly reviews are one of those Quadrant II tasks that require very little time but will have a humongous impact on your life.

At the end of each week, the weekly reviews involve the following steps:

Step 1. Review your long term goals: It will probably take one minute but that will help you frame the rest of the weekly review activity.

Step 2. Empty your head: The weekly review is a good time to do a mini braindump to add any tasks that you have forgotten to add in your system.

Step 3. Select your goals of the week: Ask yourself for each of your roles: *what would be the goal this week that would have the greatest positive impact toward your long term goals?* If you ask this question every single week, for every single role, you WILL make progress towards your goals and your life will be more balanced too.

Example:

Self

Go back to the gym

Friend

Organise a group birthday present for Mike

Family

Call Anthony (brother)

etc...

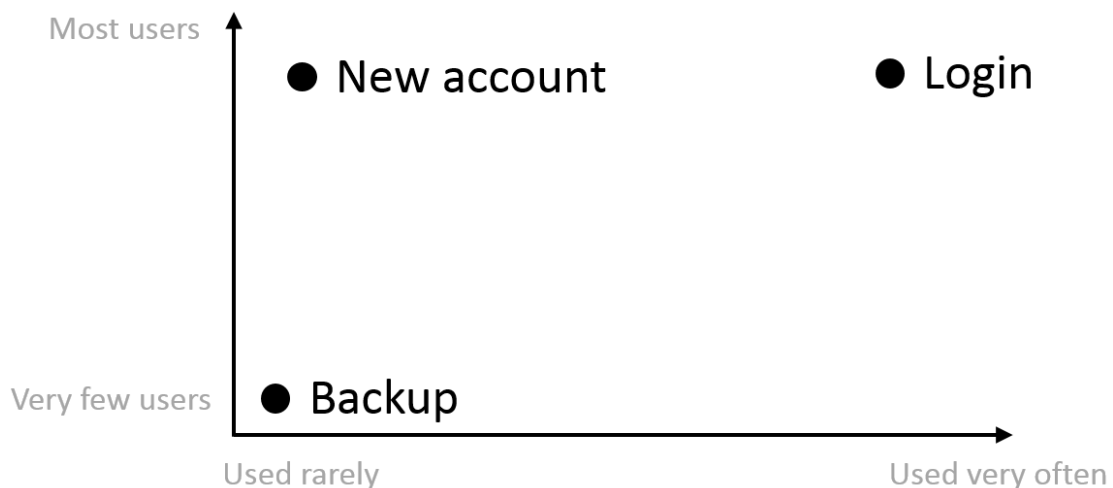


A feature that makes WeekPlan unique is the ability to list your goals of the week, per role and to have them visible all week long next to your planner.

Sometimes deciding what is the most important thing you should work on is difficult. Here is a way to approach this problem.

If you are developing a product and your objective is to improve user experience in your product, you can put the tasks in a chart like this:

Goal: improve user experience



Of course, depending on your goal, you can use different criteria. If you are looking to improve your fitness but have trouble sticking with your goal for example, you could use "Fitness gain" and "Convenience" as your two axes.

Most goals can probably be mapped using "Expected Returns" and "Effort / Cost".

You want to start with the low hanging fruits, the ones that are easiest and yet yield the greatest returns.

Based on the chart, you can simply prioritize your goals and tasks.

Step 4. Schedule: Once you have identified what you should be working on this week, the next step is to put them in your schedule.

Your most important tasks are called your “big rocks” and you want to fill your “bucket” (week) starting with your big rocks first.

To fully grasp the concept, I would like to share a video with you introducing the big rocks:



Figure 1 - <https://www.youtube.com/watch?v=0VNmlxkyHd8>

Please. Do watch the video. It is powerful.

Poor summary: it teaches that if you don't schedule what matters most to you, if you don't set time aside for them, less important tasks will take the blank space in your schedule and you will never have time for your important stuff.

Activity V - Reminders

To avoid forgetting doing your weekly reviews, I recommend setting up reminders on your phone.

Inbox processing

In the book "Getting Things Done", the author explains that you should see your inbox and your time management system as two separate entities and that the triage of your inbox is an important step.

It is important to understand that your email inbox, your mailbox, your notebook, etc... are great at receiving incoming information, potential tasks and ideas, but suck at time management. It is not their role.

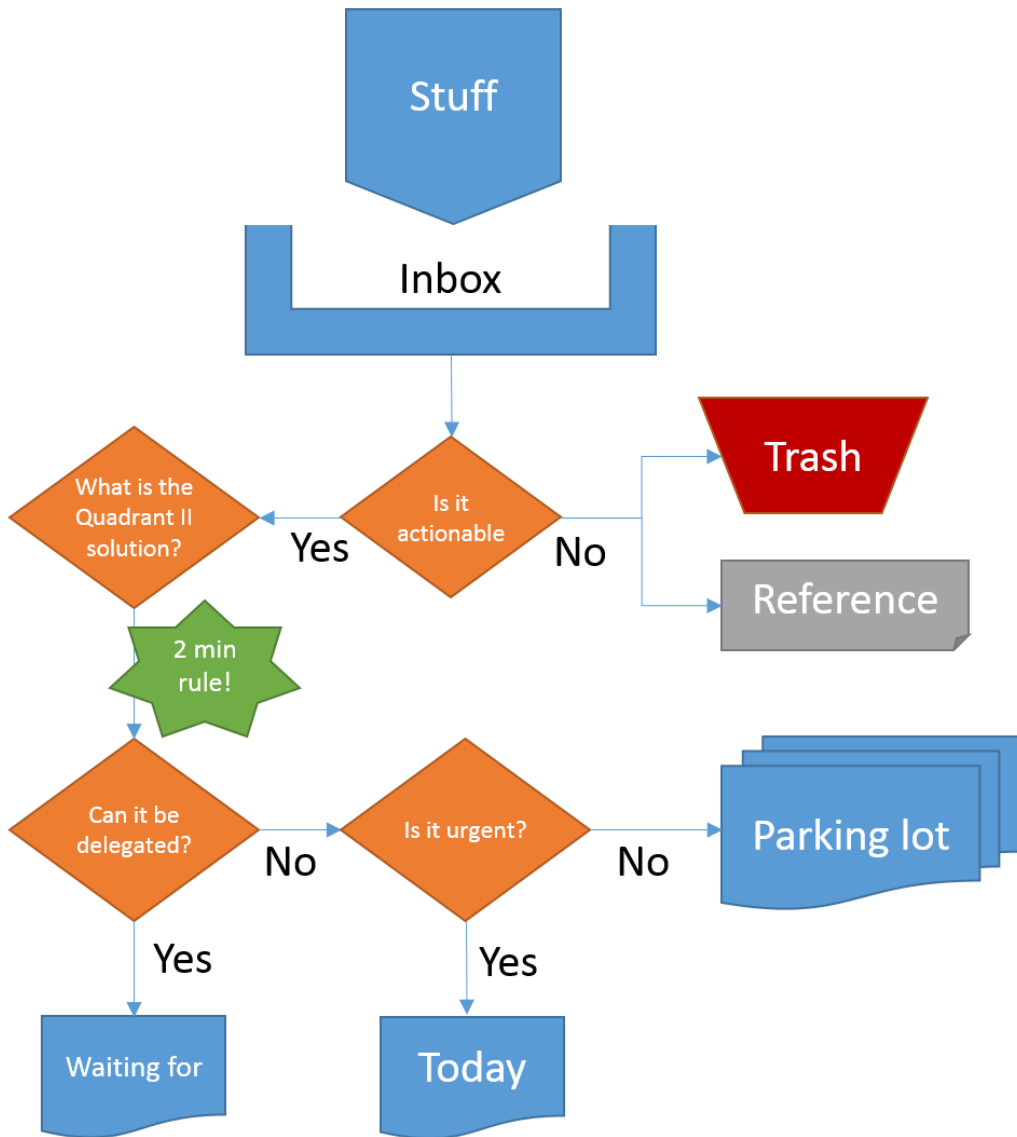
You should regularly (preferably at set times) go through your inboxes and process them.

For example, Tim Ferriss, a bestseller author and "lifehacker", only checks his emails twice a day, at 11am and 4pm. Here is his blog post about it: <http://fourhourworkweek.com/2007/03/22/how-to-check-e-mail-twice-a-day-or-once-every-10-days/>

The next page is a diagram that describes the process of going through your inbox and deciding what to do with each item.

We will look more in details how it works.

Inbox processing as a Quadrant II self-manager



Is it actionable?

Some of your emails for example are not actionable. You may decide to file it somewhere for future reference, or simply delete it.

Note: For users of Gmail, you can delete your emails without fear, you can still search in them and retrieve them.

I personally recommend OneNote for storing information for future reference.

What is the Quadrant II solution?

This is where our workflow differs from the original one described by the GTD book. Instead of treating every incoming tasks as something to do, we should first reflect on what is the best way to handle that task.

What does a Quadrant II solution look like? Instead of just doing something, we try to find a way to do something so that we never have to do it again.

For example, if you are a product manager and receive a lot of customer support questions by email, the solution would not be to reply to each of them *ad vitam eternam* but to set up a public FAQ page and make sure your customers can find it.

Instead of just adding a meeting in your calendar, it could be scheduling time to prepare for the meeting and clarify the agenda with the organizer. (A meeting without a clear agenda is often a waste of time).

2 minutes rule

Once you have decided what the Quadrant II solution is, if that task would take two minutes or less, don't bother adding it to your system, just do it.

Don't add overhead when it is not needed.

Can it be delegated?

Delegating is a great way to leverage your time and make use of everyone's unique talents.

It is unfortunately perceived as something only available to managers who have a team under them.

Delegation can be used at home for example: the kids can help with house chores.

Chances are that you already delegate things. When you go to the restaurant, you pay someone to do the cooking for you.

Cleaner services, restaurants, grocery delivery, etc... are all services that you can use to trade money for time.

Did you know that you can hire a personal assistant for \$10 per hour? You can hire virtual assistants from countries with lower costs of living where \$10 per hour is actually a better pay than what they would receive if they were working for a local company. (True story: I met someone, hired by Google, who was being paid \$1.5 per hour).

What can a virtual assistant do for you? Well it depends on your situation, but basically anything that can be done remotely: they could make phone calls, filter emails, do some research on the web, do things that would be too expensive/difficult to automate, etc... I wrote about this topic more in details here: <http://aymeric.gaurat.net/2012/tasks-a-virtual-assistant-can-do-for-an-online-entrepreneur/>

If you are interested, you can go to odesk.com or taskarmy.com (I recommend this service: <http://taskarmy.com/services/2040-be-your-jack-of-all-trades-virtual-assistant>) to look for a virtual assistant.

Is it urgent?

Depending on the answer to this question, the task will end up in two separate storage locations.

If it is not urgent, you can park it in your parking lot. The parking lot is simply a place where you store your projects, lists, and tasks that don't have a due date.

If it is urgent, then you should add the task to your Today list.

Comments on entering a new task in your system

When adding a new task, you should try to write the task in an actionable way.

For example, instead of “Book appointment with doctor”, it would be better to use “Find doctor’s phone number (to book appointment)”.

Clarifying the direct next action will help reduce friction when comes the time of doing. Your mind will procrastinate if it doesn’t know what to do to start a task.

Spend the extra split second to decide what is the next action, it will be worth it.

Another question to ask yourself is: will this task help me make progress towards my goals?



In WeekPlan (software), you can visually see important tasks to help you prioritize easily.

Daily reviews

Now that you know how to enter new tasks into your system, it is time to look at how to decide what to work on today.

1. Review of the existing tasks

At the start of the day, you look at the tasks that are already in the Today list and demote to your Parking lot any task that you don’t want to finish today (maybe because more urgent/important stuff came up).



WeekPlan (software) automatically moves the uncompleted tasks to today for you.

2. Review of the *Waiting for / Blocked* list

The *Waiting for / Blocked* list is for tasks that you cannot complete because you are blocked for some reason or to keep track of emails you expect an answer to.

During the daily review, just double check whether there is anything that has been unblocked.

3. Promotions from Parking lot

If you decide that you can complete more tasks during the day, you can promote tasks from the Parking Lot.



WeekPlan (software) allows you to enter the estimated time a task would take and it automatically sums all the estimated times in a list to help you figure out whether you have room for more.

Deciding what to work on next is difficult and yet very important. If you have used the technique mentioned in the section "Weekly Reviews", your tasks in the parking lot should already be ordered based on their priority.

Simply promote the tasks from the Parking lot to today to commit to them.

And that's it! Now it is time to go through the tasks in your Today list and do them.

Execution or lack of.

When it comes to the actual "doing", some people may procrastinate. You need to understand the why if you want to be able to solve the root issue.

1. If you don't have a clear idea of why you should do something, chances are that you will not be motivated to do them. People tend to do things around two feelings: pain and pleasure. You want to reduce pain and increase pleasure. Try to clarify what you would get out of doing that particular task.
If the rewards are not enough to motivate you, try adding a reward yourself. "If I go to the gym three times this week, I will go out on Saturday for dinner."
2. If your mind doesn't know how to start, it will procrastinate. Make sure you identify where to start. Break down the task into smaller pieces and make sure the first action is well understood.

3. Low energy. If you don't rest enough, or if you are stressed, chances are that you will find difficult tasks... difficult. Focus on getting quality sleep, and quality re-creation time. (Computer related stuff doesn't usually fall in that category). Monitor your nutrition too.
4. Poor focus. Some people struggle to focus on certain kind of tasks. They always find other things to distract them. My advice is to try to gamify the task to make it more attractive.

One popular technique is the Pomodoro Technique (<http://pomodorotechnique.com/>). Basically you set a kitchen timer to ring in 25 minutes, and during these 25 mins, you commit on focusing on that one task. Once the time is over, you give yourself a 5 minutes break where you should go out and have a walk or other re-creation activities and start again. This technique, although very simple, seems to work for a lot of people.



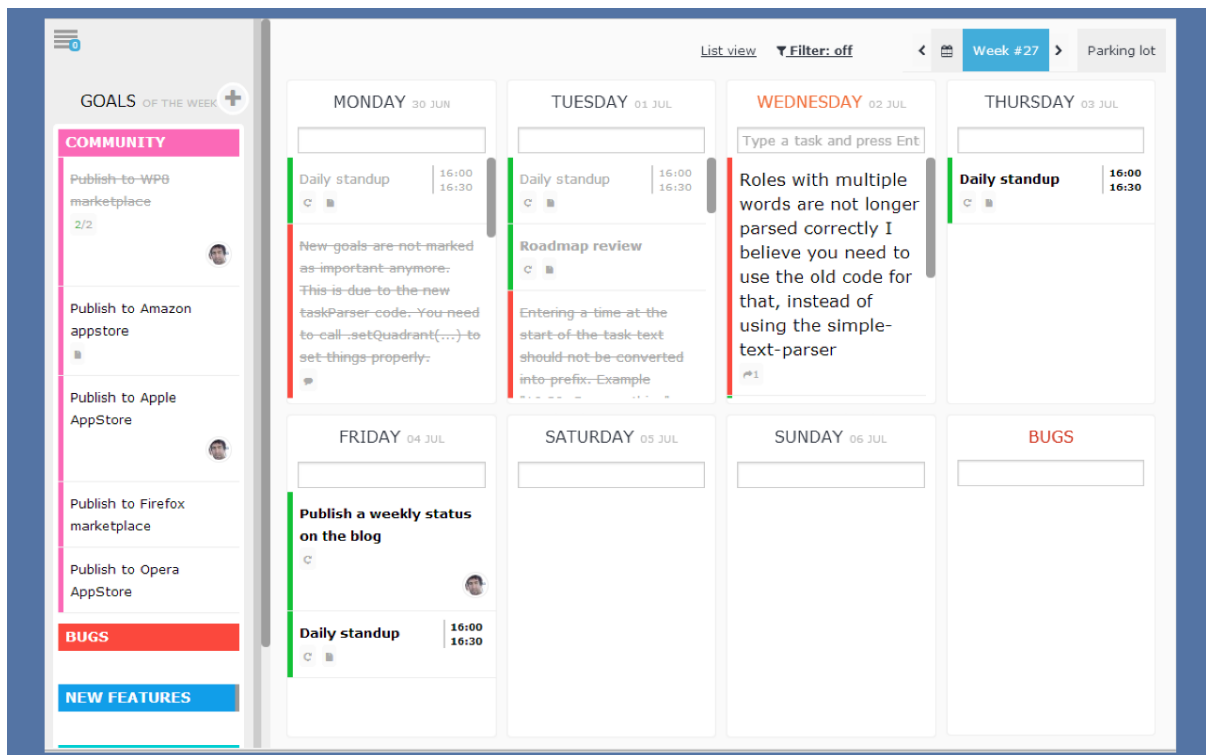
WeekPlan (software) has a pomodoro timer integrated that will automatically attach the time spent to the task at hand.

Fin

I hope this little ebook was useful to you.

I tried to keep it concise and yet share some of the most useful tips I learned while working in the productivity space.

And consider using WeekPlan (<http://weekplan.net>) if you aren't using it already!



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