

| CAPTURE TASKS   | DECIDE                                  |
|---|---|
| email   | do                                      |
| mail  | delete                                  |
| telephone   | Defer (file)                            |
| meetings  | Delegate (fwd)                          |
| news events   | discuss                                 |
| ENTER SYSTEM  | REVIEW                                  |
| 2 minutes or less                                     | Do it now                               |
| Date sensitive  | Calendar                                |
| Steps to do   | Next actions/to-do                      |
| More than 2 steps                                     | Projects                                |
| SET PRIORITIES  |   |
| 1-High impact, low effort                             | DUE                                     |
| 2-High impact, high effort                            | 1-today                                 |
| 3-Low impact, low effort                              | 2-this week                             |
| 4-Low impact, low effort                              | 3-later                                 |
| I-important & urgent                                  | Manage                                  |
| II-important, not urgent                              | Increase                                |
| III-urgent, not important                             | Decrease                                |
| IV-not urgent or important                            | Eliminate                               |
| REVIEW/PLAN   |   |
| DAILY<br>Review day &<br>Weekly plan<br>Plan next day | WEEKLY<br>Review week<br>Plan next week |

| WEEKLY PLAN  |                      |
|--|----------------------|
| 1. fill in deadlines & scheduled events                            |                      |
| 2. add regular tasks that must be accomplished at work and at home |                      |
| 3. add tasks that move goals & projects forward                    |                      |
| 4. include activities to increase personal development             |                      |
| 5. think of menus  |                      |
| 6. add items as needed   |                      |
| PLAN   | REVIEW               |
| Prepare  | Past & next week     |
| Organize   | Calendar             |
| Check  | Follow-up system     |
| Select   | Repeating tasks      |
| Schedule   | Next actions/to dos  |
| Add action steps   | Goal & project plans |
| Update   | Ideas-someday/maybe  |
|  |                      |

| Week:     |              |
|-----------|--------------|
| Monday    | Tuesday      |
|           |              |
|           |              |
|           |              |
| Wednesday | Thursday     |
|           |              |
|           |              |
|           |              |
| Friday    | Saturday     |
|           |              |
|           |              |
|           |              |
| Sunday    | This week    |
|           | appointments |
|           | meetings     |
|           | call         |
|           | write        |
|           | errands      |
|           | projects     |
|           |              |
|           |              |

| DATE:                                   |                 |                          |
|---|-----------------|--------------------------|
| Appts                                   | To-Do Items     |                          |
| priority                                |                 | ✓                        |
| 5:00                                    |                 |                          |
| 6:00                                    |                 |                          |
| 7:00                                    |                 |                          |
| 8:00                                    |                 |                          |
| 9:00                                    |                 |                          |
| 10:00                                   |                 |                          |
| 11:00                                   |                 |                          |
| 12:00                                   |                 |                          |
| 1:00                                    |                 |                          |
| 2:00                                    |                 |                          |
| 3:00                                    |                 |                          |
| 4:00                                    |                 |                          |
| 5:00                                    |                 |                          |
| 6:00                                    |                 |                          |
| 7:00                                    |                 |                          |
| 8:00                                    |                 |                          |
| 9:00                                    |                 |                          |
| 10:00                                   |                 |                          |
| <b>Results</b>                          | Tasks completed | <input type="checkbox"/> |
| Time Quadrants I                        | II              | III                      |
| Time spent QII leadership               |                 | <input type="checkbox"/> |
| 80/20: % discretionary time productive  |                 |                          |
| 10   20   30   40   50   60   70   80 W |                 | <input type="checkbox"/> |
| 10   20   30   40   50   60   70   80 H |                 | <input type="checkbox"/> |
| W=work H=home                           |                 |                          |

| This Week                    | S                          | M | T | W | T | F | S                        |
|------------------------------|----------------------------|---|---|---|---|---|--------------------------|
| <b>Total tasks completed</b> |                            |   |   |   |   |   | <input type="checkbox"/> |
| QI time                      |                            |   |   |   |   |   |                          |
| +QII time                    |                            |   |   |   |   |   |                          |
| QIII time                    |                            |   |   |   |   |   |                          |
| -QIV time                    |                            |   |   |   |   |   |                          |
|                              | Effectiveness              |   |   |   |   |   |                          |
| <b>QII total</b>             |                            |   |   |   |   |   | <input type="checkbox"/> |
| 80/20 time                   | % discretionary productive |   |   |   |   |   |                          |
| work                         |                            |   |   |   |   |   |                          |
| home                         |                            |   |   |   |   |   |                          |
| <b>Avg %</b>                 |                            |   |   |   |   |   | <input type="checkbox"/> |
|                              | Productivity               |   |   |   |   |   |                          |
| Last week                    |                            |   |   |   |   |   |                          |
| # of actions                 | <input type="checkbox"/>   |   |   |   |   |   |                          |
| QII total                    | <input type="checkbox"/>   |   |   |   |   |   |                          |
| Avg %                        | <input type="checkbox"/>   |   |   |   |   |   |                          |
| Trends                       |                            |   |   |   |   |   |                          |
| Notes                        |                            |   |   |   |   |   |                          |
|                              |                            |   |   |   |   |   |                          |

| 3 months of productivity |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|--------------------------|
| MONTH:                   |                          |                          |                          |
| Weekly                   | Actions                  | QII                      | Avg %                    |
| One                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Two                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Three                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Four                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Total                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| MONTH:                   |                          |                          |                          |
| Weekly                   | Actions                  | QII                      | Avg %                    |
| One                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Two                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Three                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Four                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Total                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| MONTH:                   |                          |                          |                          |
| Weekly                   | Actions                  | QII                      | Avg %                    |
| One                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Two                      | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Three                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Four                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Five                     | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Total                    | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |