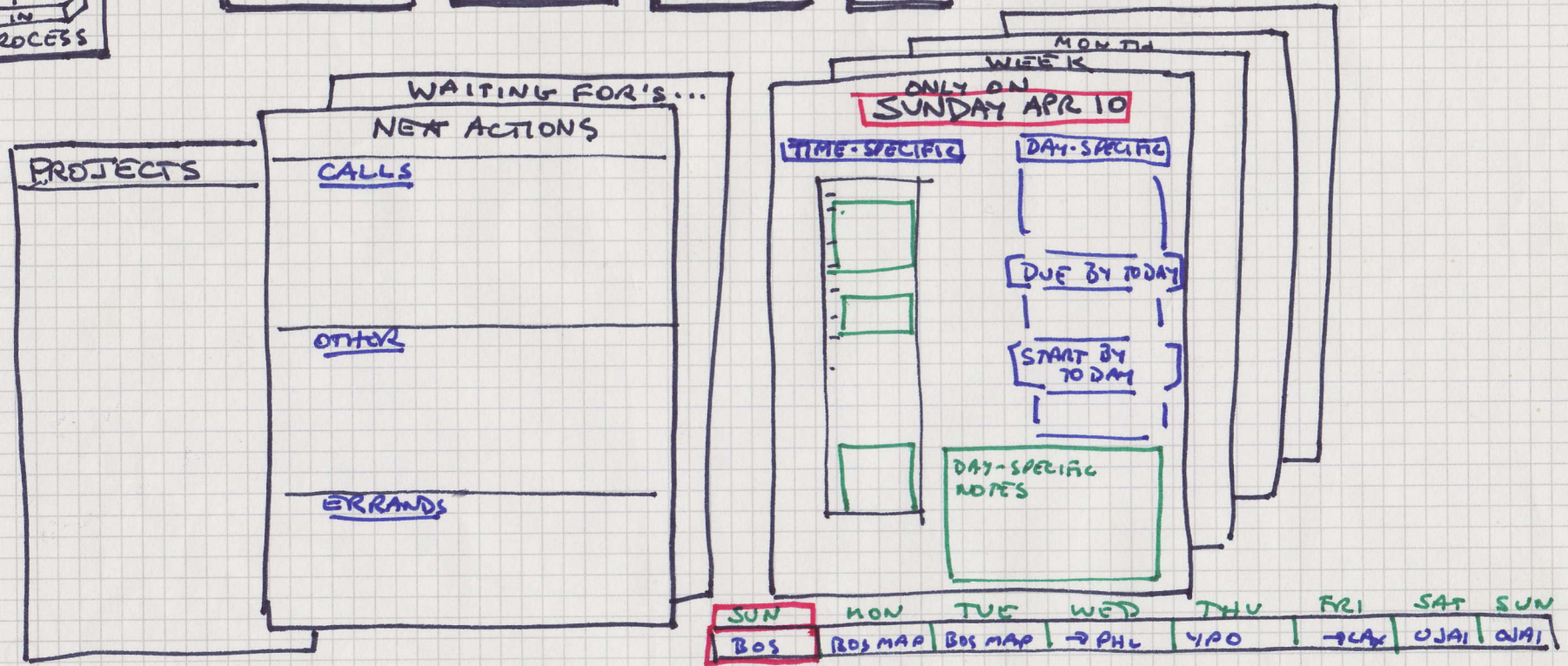


- DEFAULT DE-BRIEFING PROCESS WEEKLY (CAN CUSTOMIZE) KEEPS LIFE CURRENT + HEAD CLEAR
- CUSTOMIZE LIST SORTING [DUE DATE, PRIORITY, PROJECT, AGE, SIZE, PERG VS. PROF., ETC.]
- CROSS REFERENCE PROJECTS TO RELATED ACTIONS, WTB-FOR'S, REFERENCE, PEOPLE, DATES, MTGS., ETC.
- DECISION-MAKING AND ORGANIZING EXPERT SYSTEM ASSISTANCE BUILT IN
- RETROSPECTIVE CALENDAR ARCHIVE/LOG
- GLOBAL SEARCH
- GATEWAY TO ALL OTHER SOFTWARE (WHILE PROCESSING)
- ALLOWS FREE-FLOWING THINKING WHILE TRACKING ~~THE~~ TOWARD CLOSURE
- RULES-BASED CUSTOMIZING (E.G. EVERY AA PHONE SCHEDULED, SCHEDULE FLTR. UPGRADE)
- PRINTS ANY VIEWS IN ANY HARD-COPY FORMAT [E.G. BY MTG, PERSON, DATES, PROJECT]
- GENERATES COMPLETE HARD-COPY SYSTEMS WITH UP-TO-THE-SECOND LISTS + DATA
- TAG ANY FILE/LOCATION/ACTIVITIES → IN-BASKET TO ENSURE LATENT CLOSURE [OR MAKE ANY NOTE]
- ALARM

All-purpose Grid

INITIAL / CURRENT VIEW SCALE: 1/2" =

4/12/94



- 🚩 YOU HAVE ^{TO PROCESS} ITEMS IN YOUR IN-BASKET
- 🚩 YOU HAVE PROJECTS WITH NO NEXT ACTION DEFINED
- 🚩 PREVIOUS CALENDAR ITEM NOT COMPLETED!

INPUT BOX
BRAIN DUMP
PROCESS

PROJECTS

VIEW ACTIVE...
VIEW SOMEDAY'S...
NEW...

NEXT ACTIONS

LIST...
NEW...

WAITING FOR'S

LIST...
NEW...

CALENDARS

VIEW TODAY... (MO, YR.)
ADD...
TICKLER...

MEETINGS

- VIEW
- ADD...
- EDIT...

COMMUNICATIONS

CREATE...
SEND...
EDIT...

VIEWS (SETS)

CURRENT COMMITMENTS
AREAS OF FOCUS
GOALS/OBJECTIVES

FIND

BY PERSON
BY KEY WORD
BY DATE
BY PROJECT
BY AREA
BY DATE RANGE

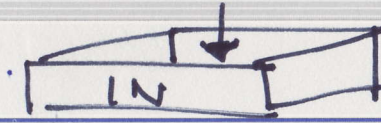
FOCUS AREAS

VIEW...
ADD...
EDIT...

REFERENCE LISTS

• VIEW...
• ADD...
• EDIT...

All-purpose Grid



SCALE: 1/2" =

WHAT'S ON YOUR MIND...?

QUICK TRIGGER LIST

ACCOMPLISHMENTS?
INTERACTIONS?
INCOMPLETIONS?
EVENTS?
NEW TO-DO'S?
DISMAYCTIONS?
NEW IDEAS?

FULL TRIGGER LIST

[FROM
MAP
LIST]

A large vertical grid with 8 horizontal lines and a small arrow pointing to the top left corner.

PROCESS NOW

ADD TO IN-BASKET

All-purpose Grid

IN
PROCESS

SCALE: 1/2" =

(1st) ITEM

ACTION ON THIS?

• ~~COMMITTED TO DO SOMETHING ABOUT THIS?~~

NO

DISCARD?

SOMEDAY/MAYBE?..

→ GO TO "SOMEDAY"

REFERENCE/SUPPORT.

YES

- OR
- ACTIVATE
 - INCUBATE
 - ELIMINATE

POTENTIALLY MORE THAN SIMPLE STEP?

↓
(GO TO "PROJECTS")

OR...

TITLE PROJECT/OUTCOME

WHAT'S THE NEXT ACTION?

↓
GO TO "NEXT ACTIONS"

SIMPLE ACTION

LESS THAN 2 MIN?

(ALARM)
DO IT

CAN IT BE DELETED?

NO

↓
GO TO "NEXT ACTIONS"

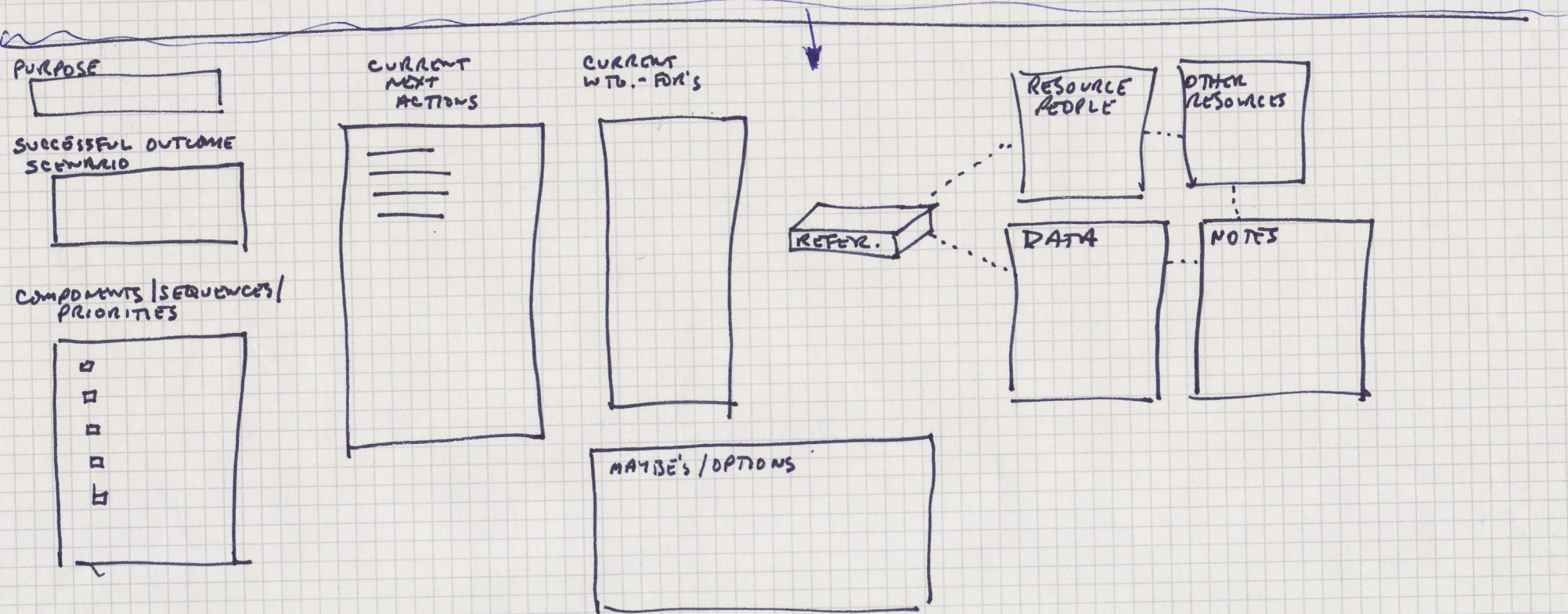
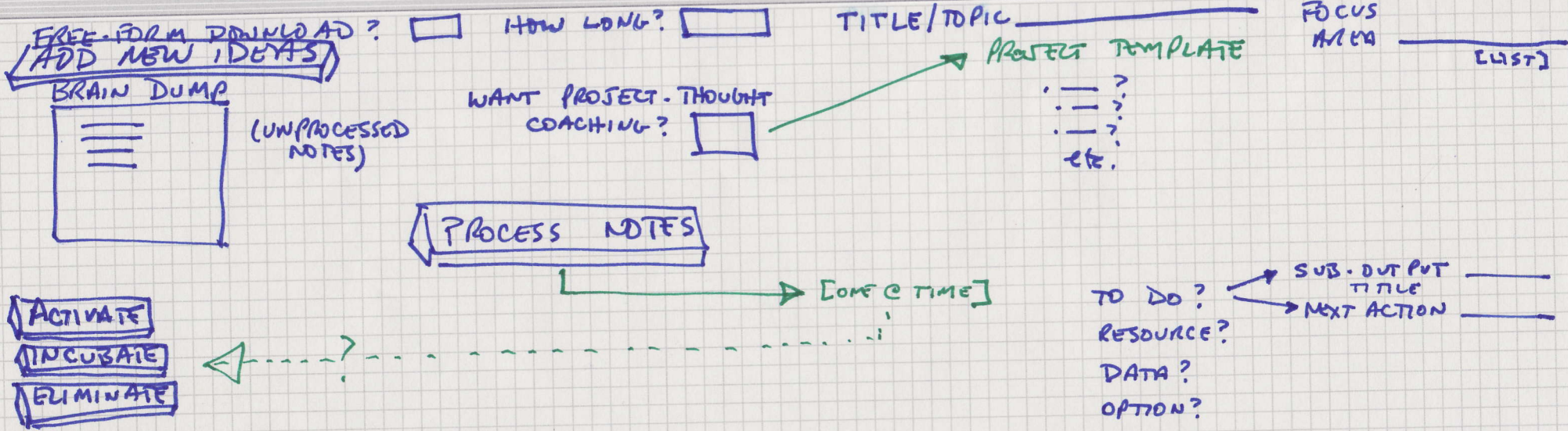
YES

↓
GO TO "COMMUNICATION"

All-purpose Grid

PROJECT (INPUT)

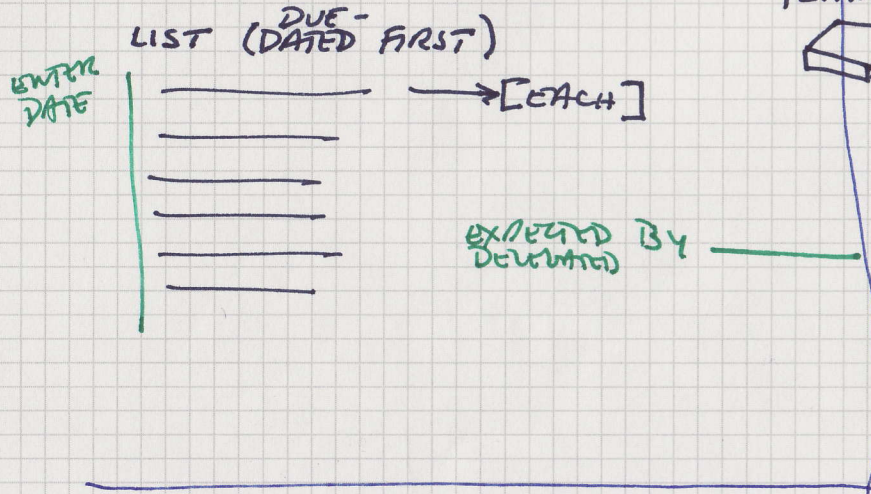
SCALE: 1/2" =



All-purpose Grid

PROJECTS

SCALE: 1/2" =

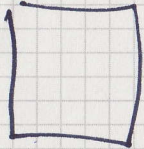


PLANS/OUTLINE/ORGANIZATION



PURPOSE/GOAL/VISION
STANDARDS

RELATED TO
WHAT LARGER
AREA OR
OBJECTIVE?
OR
OUTPUT?



SUCCESSFUL
OUTCOME -
DESCRIPTION

RESOURCE PEOPLE

ACTIONS DONE	NEXT ACTION(S)

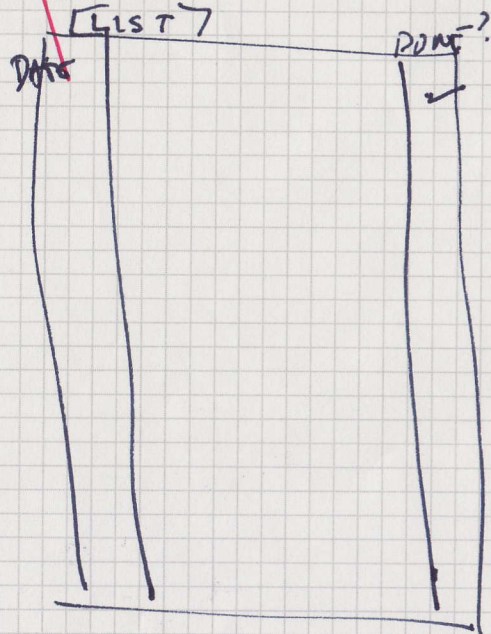
CUSTOMERS
RECIPIENTS
BENEFICIARIES

All-purpose Grid

NEXT ACTIONS

SCALE: 1/2" =

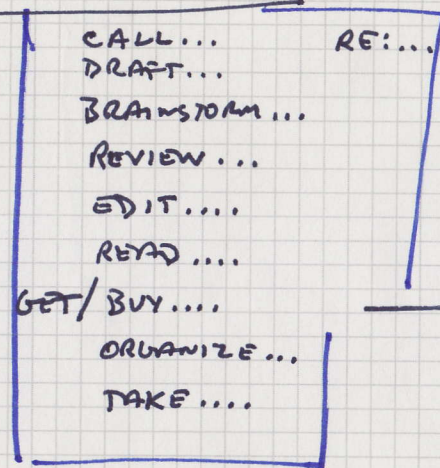
AUTO DATES
ENTRIES



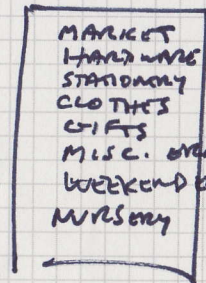
→ RISKS } PROJECT COMPLETE?
 WHAT'S THE NEXT ACTION? —

CAN BE DELEGATED

GO TO COMMUNICATION VIEW



ERRAND LIST?



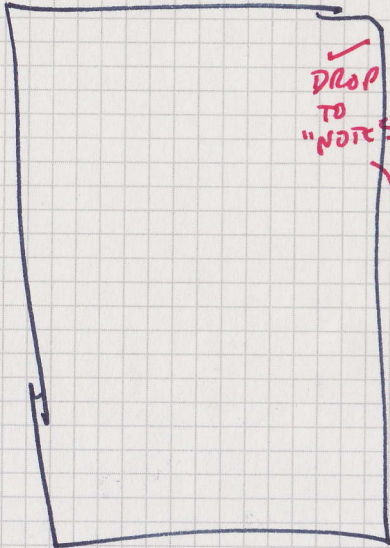
AMTDAY
 WEEKEND

- [ONE! ONLY.]
- CAN ONLY DO ON [DATE]
 - NEED TO DO BY [DATE]
 - NEED TO START BY [DATE]
 - DO AS SOON AS APPROPRIATE

FOCUS AREA [DEFAULT FROM PROJECT]
 [PULL-DOWN IF SINGLE ACTION]

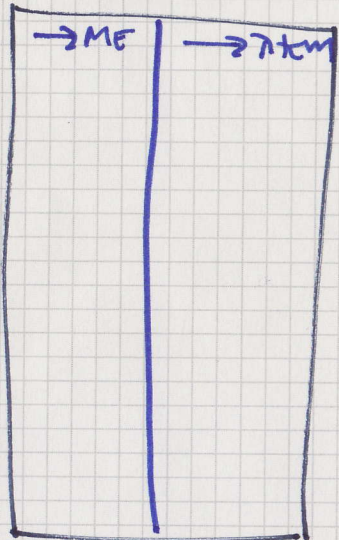
PRINT PRIOR TO MTD.

DISCUSSION
AGENDAS

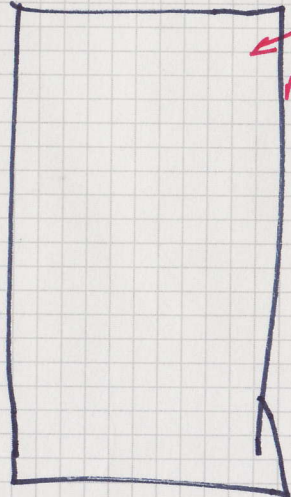


Drop
to
"NOTES"

WTH. FOR'S
OUTSTANDING

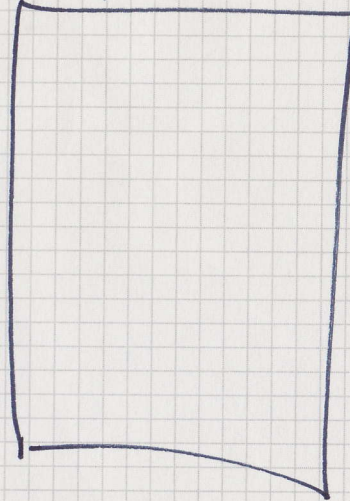


RESOURCE FOR
WHAT PROJECTS/AREAS?

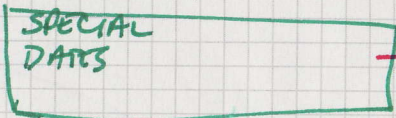


tie
to
PROJECTS
AREAS

ON-GOING
INTEREST
POINTS



CALENDAR

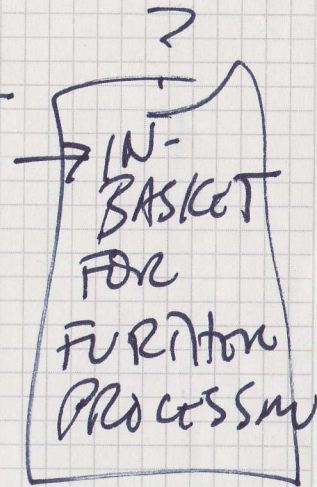
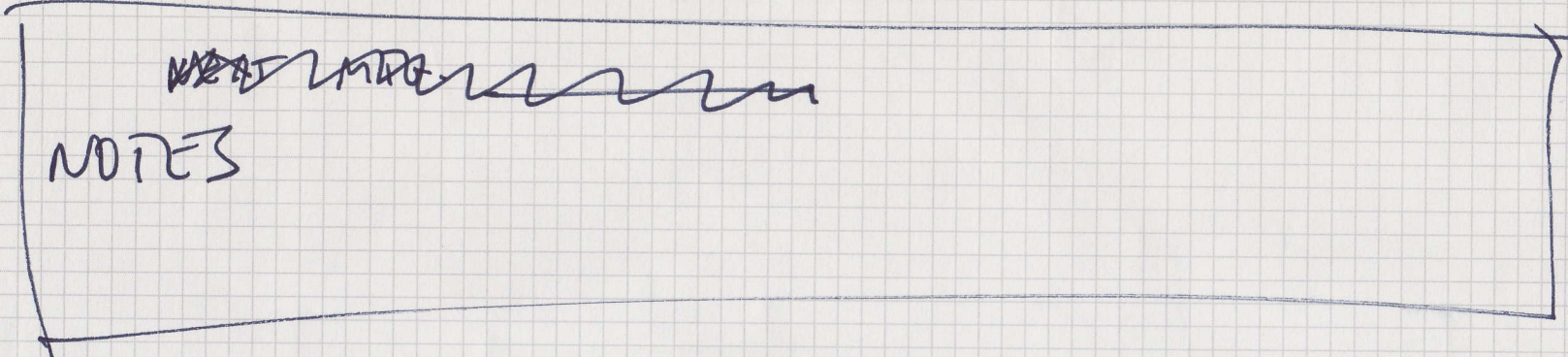


FROM
TICKLER

~~LAST MTD.~~

~~WTH. FOR'S~~

NOTES



All-purpose Grid

SOMEDAY / MAYBE... SCALE: 1/2" =

ITEM _____

FOCUS AREA _____

• INCLUDE IN IDEAL VISION?

• BRAINSTORM? _____ MINUTES → GO TO "TOPIC DEVELOPMENT"

• REMIND/REVIEW THIS HOW?

SOMEDAY LIST
(WEEKLY REVIEW)

FUTURE DATE _____

EVERY _____
(TICKLER)

All-purpose Grid

TICKLOR

SCALE: 1/2" =

~~REQUIREMENTS~~

ACTIVITY / EVENT / NOTE

PERSONS INVOLVED

DATE

RECUR EVERY

NOTIFY

DAYS
WEEKS
MONTHS
AHEAD

→ TIE TO CALENDAR
[DAY-SPECIFIC
NOTES]

→ TIE TO
"PERSON"
VIEW

All-purpose Grid

MEETINGS

SCALE: 1/2" =

UPCOMING OCCURRED

TITLE

STAFF
PROJECT
COMMITTEE
OTHER
SALES

PROJECT TIE?

[LIST]

DATE _____

EXPECTED PARTICIPANTS

[LIST]

POSSIBLE/
PROPOSED AGENDAS

INFO TO GIVE

INFO TO GET

OPTION TO EXAMINE

CHOICES
~~DECISIONS~~ TO MAKE

SET NEXT
MTG.?

[IF "OCCURRED"]

EACH TOPIC

PROJECT TIE

- DECISIONS
- NEXT ACTIONS
 - WHO? _____
 - WITH? _____
 - DATE? _____
- NOTES

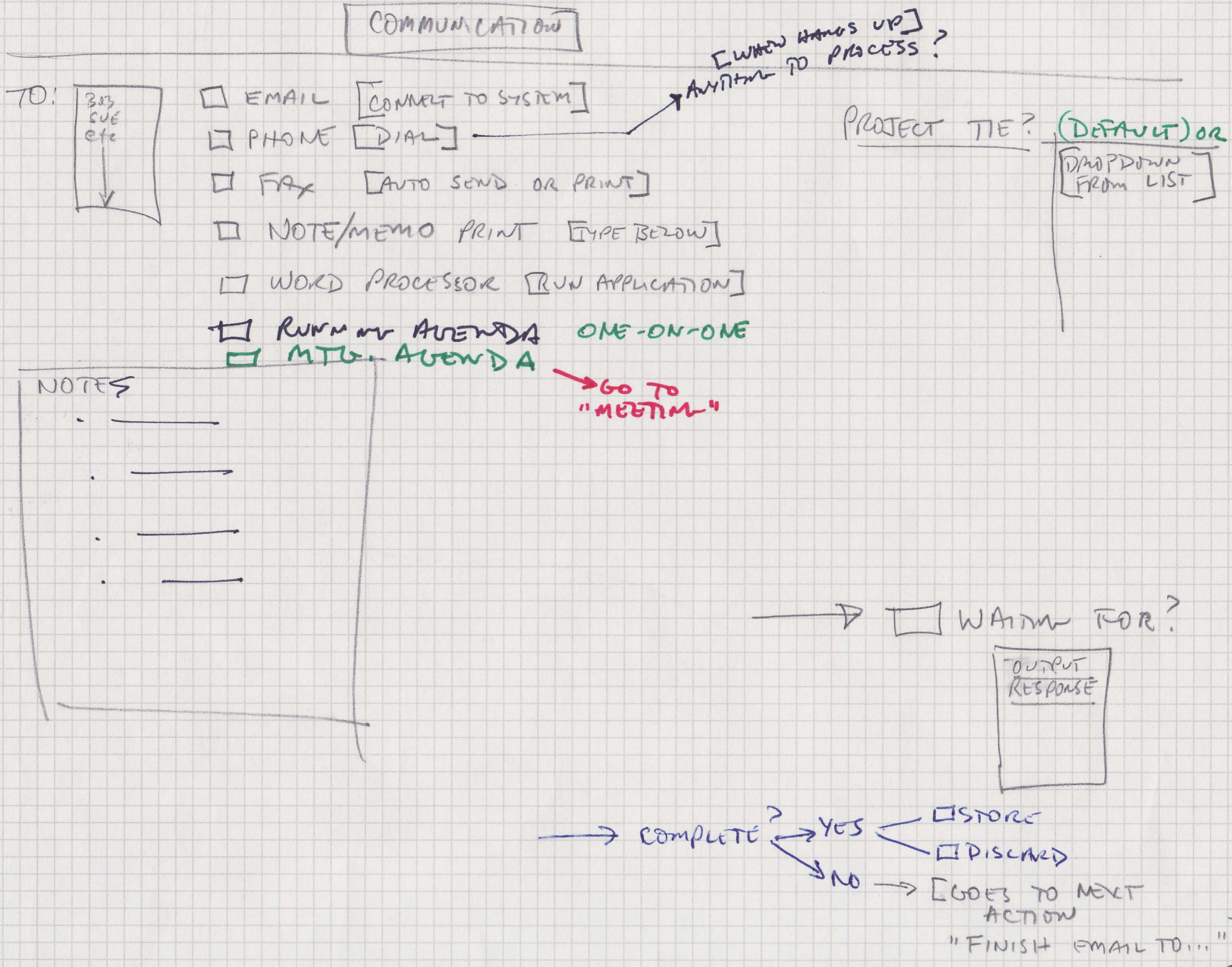
SEND TO
IN-BASKET

[PRINT TO FILL IN NOTES]

All-purpose Grid

COMMUNICATION

SCALE: 1/2" =



All-purpose Grid

AREAS OF FOCUS

SCALE: 1/2" =

GOALS + OBJECTIVES

Area

ACTIVE PROJECTS

NEXT ACTIONS

SOMEDAY / MAYBE'S
LATER REVIEW

REFERENCE
ROUTINES +
REMINDERS

|||

|||

|||

=

Reference

LIST 1

LIST 2

RESOURCE
PEOPLE

☐ Eg. WINE LISTS

☐ ~~BOOKS~~ RECOMMENDED
RESOURCES

<

BOOKS ☐
TAPES ☐
VIDEOS ☐
SEMINARS ☐
PEOPLE ☐

All-purpose Grid

SCALE: 1/2" =

ENTRY DATE	OUTCOME / ACTIVITY	PROJECT TITLE	FOCUS AREA	EXPECTED BY (written)	DUE DATE	MUST BE STARTED BY (written)	DONE (DATE)

PLAN
HIGHEST
TO DELEGATE
TO

DELEGATED
TO
↓
DATE

All-purpose Grid

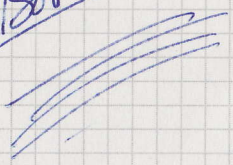
REFERENCE LISTS

SCALE: 1/2" =

[WILL HAVE SOME FORM-DESIGN CAPABILITIES] [OR MACRO TO RUN WP APP]

CITIES/AREAS YELLOW PGS.
(ETC.)

Books



All-purpose Grid

WEEKLY DE-BRIEFING

SCALE: 1/2" =

- DATA DUMP
- PROCESS IN-BASKET \leftarrow ON LINE
DESK/BRIEFING CHECK
- REVIEW DAILY PAGES SINCE
LAST DE-BRIEF
 - ADD NOTES
 - ARCHIVE
- TODAY'S CALENDAR - OK?
- PROJECT REVIEW
 - DONE?
 - NEW TO ADD?
 - NEXT ACTION ON EACH?
- WTO FOR REVIEW
 - REC'D?
 - NEW?
 - NEXT ACTIONS ON ANY?
- ROUTINES/RESPONSIBILITIES/CHECKLISTS
 - OK?
 - NEXT ACTIONS?
 - ADDITIONS?
- US COMM CALENDAR REVIEW
 - ADDITIONS/CHANGES?
 - PREPARATIONS REQUIRED? ACTIONS
 - DAY THEMES/LOCATIONS UPDATED?
- NEXT ACTIONS REVIEW
 - DONE?
 - NEW?
- FOCUS AREA REVIEWS

YOU HAVE AN ACTION RECORDED ON
YOUR CALENDAR THAT WAS NOT RECORDED AS
DONE. CALENDAR ARE FOR ITEMS THAT
EXPIRE ONLY. WE WILL MOVE THE ITEM
TO YOUR ON-GOING "NEXT ACTION" LIST, UNLESS
YOU

↓
CANCEL
□

↓
RE-SCHEDULE
□

When? _____

All-purpose Grid

COACHING MODELS

SCALE: 1/2" =

IN-BASKET PROCESSING

IN-BASKET PROCESSING

1 ITEM @ A TIME
TOP ITEM IS

- WHAT IS IT?
- OUTCOME REQUIRED?

ENTER PROJECT

- NEXT ACTION?

~~ENTER NEXT ACTION~~

DUMP IT

DO IT (< 2 MIN)

DELEGATE IT


GO: COMMUNICATION

DEFER IT

ENTER: NEXT ACTION

TIP: WHEN
STORE ~~THE~~ INPUT PARTICLE AS
REFERENCE, OR TOSS.

→ LIKE POST-IT ON SCREEN
FOR PROCESSING EMAIL

→  ON INITIAL SCREEN FOR
PROCESSING PAPER