EMyth

Self-Organization Guide

Keeping a clear mind

LEADERSHIP

Self-Organization

Purpose

Avoid overwhelm by managing your projects and tasks effectively. Overwhelm is not a result of external forces, it's a result of not taking full responsibility for your choices and not having the right tools to manage your work.

Benchmarks

1. Change the way you relate to self-organization and overwhelm

2. Set up your workspace to maximize efficiency

3. Purge unnecessary clutter

4. Implement "inbox zero" practices

5. Create your Project List

6. Improve the way you use your calendar

7. Use daily prioritization

8. Teach your employees what you've learned

Key Points

Your education probably never taught you how to effectively organize work. This is partly why you become your Technician.

Overwhelm is not a fact of business. It is an unhealthy way of relating to work that you have been taught is normal.

Having a clear head is critical to free yourself to do high-level strategic work, the work of your Manager and your Entrepreneur.

Self-organization is an ongoing maturation process, not an attainment of perfection.

Developing your inner Manager through organization is key to being able to lead yourself and others.

Multi-tasking is a myth that Technicians cling to in order to feel productive without taking responsibility for getting important things done.

Understanding Your Self-Organization Conditioning

Think back to your first year of high school. Do you remember the class that taught you how to organize your work and life? You know, the class where you learned how to use a calendar and to-do lists, how to keep a clear head when things got busy and how not to get behind.

No? Don't remember that class? That's because it never happened.

What probably did happen was that you received more and more work from your teachers without ever being given the tools to organize that work. Your life became filled with more and more content, but you were never helped to step back and look at how you managed the context of it all. In other words, you were given a lot of work, but never taught how to relate to all that work. This is, in part, the origin of your overburdened and overactive Technician.

Our educational and cultural conditioning trains us to become Technicians by piling work higher and deeper, without ever encouraging us to consider the bigger picture of what it all means, and why we're doing it in the first place. The result is a society full of Technicians who are capable of working IN their lives and businesses, but not ON them. What if this is a conditioned, artificial order of things, not the natural one?

The important thing to understand about conditioning is that until how you were trained is examined and unpacked, you're going to confuse what you were told was true with what is actually true to some degree. As a leader, it is your job to make a project out of knowing the difference between truth and fiction — not just outside of you, but inside of yourself as well. To the degree you are operating with internal distortions of truth is the degree to which you will not be able to recognize distortions of truth in your life and business. This is how blind spots work. The best leaders actively seek out and work on their blind spots, rather than wait for calamity to call their attention to them.

So, the mantra of a Technician is an unexamined, "Keep your head down, get to work and keep busy!" And, the more education you have, the more imbalanced this Technician/Manager/Entrepreneur mix is likely to be. For example, doctors, lawyers and engineers receive the most specialized and lengthy education, and while they tend to be highly focused and intelligent people, they also tend to be the most unprepared to run a business. The bad news is that you have many unproductive, technician-oriented habits ingrained in how you relate to and organize your work. You've been practicing them unconsciously for decades. The good news is that you can retrain yourself with some perseverance and a commitment to improving yourself, your life and your business. It is not an understatement to say that you have no idea what you are missing, but you're about to find out!

About Overwhelm

The unfortunate result of inadequate self-organization training is that you find yourself in a constant state of overwhelm. For small business owners, overwhelm is considered "par for the course." It's not. It's the way decades of conditioning has trained you to think and be. Just because you cannot imagine it any other way, and don't know how to do it differently, doesn't mean it's impossible.

Even if you don't identify yourself as being overwhelmed, you probably are in ways that you do not yet track. Like a refrigerator whose compressor you didn't notice was running until it turns off, overwhelm, for most people, is a background noise that distracts you all the time even if you're not aware of it. If, at a young age, you were taught that it was normal to work that way and you were rewarded for "keeping busy," why would you think otherwise?

Despite what we may have been told by living in the information superhighway era, overwhelm doesn't come from too much information. Observe how you feel in nature. A forest is one of the most relaxing places to be, but it does not lack information. In fact, you are exposed to thousands of leaves on the trees, intricate complexity in the sound of running water, hundreds of sounds from animals and insects. There's undoubtedly more information to absorb in just a few minutes walking through a forest than there is in your office, so why does one leave you feeling calm and the other overwhelmed?

Because in your business you may need to act on the information that comes at you.

Consider this for a moment. This one distinction has the power to change your life. The effect of being constantly exposed to information you may need to act on is that you are constantly distracted and unfocused (albeit often at an unconscious level). Most people operate at a comfortable level of information exposure, allowing meaningful information to "reach out and grab them" easily. This may be workable only up to a point, a point you may have exceeded without realizing the price that you and your business are paying.

Scientific research has shown that the human brain is only capable of holding up to nine commitments at any given time. That means that if you have more than nine things going on in your life and business, then you are juggling.

Since you began reading this process, how many times have you thought of something you needed to do later today, or maybe this week? How many times has an alternative "to-do" popped into your head while you're focused on what you're currently doing? Consider that this is not normal, but an artifact of poor self-organization conditioning. It's not your fault, but it is something that you have to take responsibility for changing.

When your brain is juggling too many commitments, you can't focus entirely on what you're doing. It may seem to you like you can focus well, but just like the refrigerator noise, it's likely that you don't even know the deep level of focus you are missing out on.

If your self-organization system is not up to the task, you are operating in overwhelm. If you're operating in overwhelm, your Technician is in charge of your business. And, if your Technician is in charge, no one is really in charge. There is no one at the helm of your business. Your Technician only knows how to work harder. The result is more overwhelm. It's a vicious cycle.

Engineers call this a negative feedback loop. At EMyth, this is the suffering loop of the Technician. It's the illusion that working harder is the answer. You've got to get bigger. You've got to stop juggling. The price you're paying for your overwhelm is the experience of running in place, rather than forward movement.

The Myth of Multitasking

Multitasking became a very popular idea in the 1980s when the "information age" emerged. It was a reasonable response to the tide of increased data at the time. But more and more people are discovering the limits of multitasking. It's important to understand that, strictly speaking, multitasking is impossible. A human being is capable of doing two things at once and only if one activity requires no active thought process, and even then only barely.

For example, you're able to drive while talking on your cell phone if you know the area in which you're driving. However, if you're driving in an unfamiliar area and actively need to navigate, you would probably need to put your cell phone down. How many times have you needed to turn the radio off when suddenly you realize you don't know where you're driving? Some aspect of you knows you can only do one thing at a time, and yet too often we kid ourselves about what is possible.

Multitasking is not, as it's commonly held, working on many things simultaneously. It is working on a number of things for short durations in sequence, combined with pairing things that require more attention with things that require almost no attention. You talk on the phone while you cut your fingernails (not putting your full attention into either task). You check your email while you end the conversation. You hang up and start replying to an email. Another email comes in and you read it. It's an invitation to a meeting tomorrow. You check your calendar to see if you're free. It reminds you about your dentist appointment next week. Wait, what was that email you were writing? What was your priority?

Unfortunately, the higher your mental capacity, the greater capacity you have for this kind of spinning.

You can get a lot done in that mode, true enough, but you cannot be a Manager or Entrepreneur in that state. In other words, you cannot work on your business effectively even in a mild state of overwhelm because only your Technician operates from this place. So while you may feel productive doing your EMyth work while you listen to the news, or think about how to coach your son's soccer team, you are in fact fooling yourself. In this case your Technician is in control and trying to reduce high-level strategic work to another thing on your to-do list. You'll end up filling out worksheets and not getting the results you want in your business —just like you wrote papers and took tests in school and hardly retained any of the information.

Relating to Work

So what is a healthy relationship to work and the many elements of a full life? It depends on whom you ask, of course. The Technician in you, who is probably running too much of the show called "your life," enjoys being busy. Your inner Technician has been rewarded for keeping his head down and working hard at every technician-level job you've ever had. The Technician gets a sense of self-worth from "doing it, doing it, doing it." The Technician is passionate in the pursuit of perfection, about a hard day's work and a job well done.

The Manager's view is different. The Manager cares more about results than work. The Manager knows that the Technician can be busy all day and not get anything done. Have you ever had days like that? Those days were run by your Technician. Your inner Manager would rather get two important things done every day than run around frantically touching a dozen different projects.

The Manager in you plans your work and works your plan. The Manager carefully considers how best to use your time and methodically works toward clear objectives. The Manager is not satisfied simply to be busy like the Technician, instead he wants to accomplish things

and make progress toward a goal in clear and measurable ways.

Furthermore, the Manager mindset delegates to leverage your abilities. The Manager knows that "many hands make light work" and enlists the help of others to do as much of the technical work as possible. The Manager in you spends time managing the project and the people rather than doing the work. The Manager knows that to do all of this, you need a clear, uncluttered mind, free of the details that the Technician fills your head with. The Manager knows that overwhelm is always a choice and only happens in the absence of prioritization and planning.

The Entrepreneur's view is different again. The Entrepreneur in you is not so interested in the planning (of the Manager domain) or the doing (of the Technician domain). The Entrepreneur is interested in dreaming. The Entrepreneur in you is working on the business, as it will be years from now. You expect your managers to carry out their directives as agreed upon so they are free to create, observe high-level market trends, seize opportunities, develop strategic alliances, etc.

To perform this kind of creative work, the Entrepreneur must be insulated from the day-to-day challenges of the business — those are neither the Entrepreneur's strength nor the Entrepreneur's responsibility. "Work" does not exist in a box for the Entrepreneur.

Rather, for the Entrepreneur, work could include wandering around a drug store thinking about what needs consumers are not getting met, or going up in a hot air balloon to get perspective on a strategic decision, or sitting in the breakroom behind a newspaper for hours to get a better sense of your company's culture. Like the Manager, the Entrepreneur's work requires a clear mind. The Entrepreneur knows that creativity is what started your business and is what will keep it alive in a changing world with changing markets. The Entrepreneur knows that lack of focus and overwhelm is the surest way to miss an opportunity. The Entrepreneur knows that opportunity is the fuel of a successful and growing business, and you thirst for it like water in a desert.

There is truth to all three of these perspectives. The Technician mindset is not wrong; far from it. There are times when that work ethic is critical. When you're having open-heart surgery, you do not want your surgeon to be dreaming about the expansion of her practice! You want her completely consumed in the content of her work. You want perfection.

The problem is that the Technician mindset is disproportionately active in you as a result of your childhood and cultural conditioning. Said another way, your Technician is not qualified to run your business, but keeps trying to do it anyway. This is the essence of the Entrepreneurial Myth.

What you might not know is that your Technician maintains its disproportionate control of your being through your self-organizational habits — habits you have operated with for so long you think they are simply the way it is. Meanwhile, your inner Manager and Entrepreneur have suffered and languished.

The Lost Inner Manager

One of the common misconceptions of the EMyth Point of View is that it is all about the development of the Entrepreneurial personality. EMyth's primary observation is that small business owners are not typically entrepreneurs but technicians who have "entrepreneurial seizures." What is not appreciated enough is how important it is to cultivate the inner Manager as well. There are many reasons for this.

The Entrepreneurial personality is seen as more "sexy" and "adventurous" than the Manager in our society. Managers still have an association as pencil pushers or "desk jockeys." Leaders get all the credit and the managers who neither envision nor perform the work (but plan the execution and organize the workers) get little credit in our world. In school, you are rewarded for creative ideas and effective work, but not managing others to do the work for you!

Your inner Manager has not been given the attention you deserve, and like a middle sibling, has been outshined by the work ethic of the Technician and the effervescence of the Entrepreneur.

Of course, without your inner Manager, your dreams would have no traction in reality. The Manager is the traffic cop between what your Entrepreneur dreams is possible and what actually is. The Manager is responsible for organizing the chaos of your world into something that makes sense and makes a profit.

All three roles are important, but the Manager gets the least credit. Truly, nothing would work in our world without the Manager. This process will give your Manager the credit you deserve and the tools you've always needed to build a successful organization with a clear head. It's not just possible, it's critical.

The Critical Hour a Day

You know the importance of doing your hour a day of business development work. Given what you've learned in this process about your school conditioning, hopefully you have a greater appreciation for why your EMyth coach may have told you not to call it "homework." It will be challenging enough to move beyond your school conditioning without using words like that! In fact, when you slip and call it homework, it's a pretty good clue that it's your Technician still trying to run your business.

For most business owners, just the idea of an hour a day poses a number of challenges. To do high-level strategic work, you need to be uninterrupted and focused. This is somewhere between not easy and impossible for owner-managers. Please know that this is OK. Where you are is fine, and you're going to improve gradually until it becomes easy to free yourself from the operational side of the business. But in order to do this, you're going to need to change some very old habits and trust that your process will deliver an outcome that you perhaps cannot yet imagine.

Part of the hour a day challenge has to do with turning off outside stimulation. You turn off the phone. You close your email. You close the door and put a sign up that says "do not disturb unless there's an emergency." Then you learn that it takes more than that. You have to train your employees what an emergency is. Then you find out how much your business needs you in small ways that are really not emergencies at all, and you have more training to do. Your employees begin to learn to collect their questions and ask them when they can access you. They begin to think for themselves more because they have to. This is an intentional and valuable part of setting aside the hour a day, but there is another piece to it...

The internal aspect of the hour a day challenge is eliminating the subtler and therefore harder to manage distractions: the primary one being you. If you're not effectively organized and constantly juggling commitments in your head, it will significantly interfere with your ability to do business development work. You may have been a highly effective worker in many ways for years, but the work of EMyth Coaching will challenge you in new ways.

Because your Technician cannot (and should not) do the work of the program, you will need to have a clear mind in order for the Manager and Entrepreneur in you to have a turn. Access to these personalities in you has literally been blocked by the degree to which your mind is cluttered. By becoming well-organized, you will free up and enliven the dormant aspects of these personalities, freeing you to work on your business in a way you never thought possible.

But be warned: the pre-requisites of having a clear head are many. It is a completely different way of relating to the content of your life. It is reasonable to be surprised that something as small and simple as having typed file folders could be in the way of the success of your business. The connection is not readily or linearly made, to be sure, especially when you have a long history of having a cluttered mind.

So your task as a business owner is to be a good scientist and test the theory for yourself. No one is qualified to evaluate the effectiveness of a system without trying it out, especially when others can attest to its value and success. A good scientist ignores no data and has an open mind. This is what will be required of you to take this self-organization project on. You will get out only what you put in. Some things may make huge differences for you, some things not, but you must try on all of it in order to find out what fits.

Are you ready? Is enough of you bought in? If so, then let's proceed! If not, ask yourself why and ask your coach for help. You will likely learn something important about yourself. The work of EMyth Coaching will challenge you in new ways.

Getting Started

The first thing you'll need to do is to set aside at least three hours to get started. Like many activities, it takes time to "get into a groove" with self-organization set up, and your time will most effectively be spent in blocks. While working on weekends is not something we would normally recommend, it can be a very good time for this kind of work. You want long, uninterrupted hours where you can focus. You cannot work on your business if you cannot get away from it in some minimal way. If you do not have a workspace where you can close the door and be uninterrupted, you're already operating under a disadvantage. You may need to use a home office, reorganize your existing office space, create a code for "do not disturb" for your employees to notice, etc. It's common for owner-managers to not have their own office space and this is a liability that you cannot afford for very long if you're serious about working on your business. Sharing workspaces doesn't work. You need to have access to your desk whenever you want it, and it needs to be the way you like it when you sit there.

Basic Tools

These basic tools are required for an efficient workspace:

- A label-maker (preferably QWERTY)
- Pens and pencils (trash the ones you don't love)
- Stacking paper-holding trays (at least three)
- File folders (3 cut tab are best)
- Extra hanging files (if you use them)
- Post-its (3x3s)
- Trash and recycling bins (within arms reach)
- Paper clips, binder clips and rubber bands
- A stapler
- Plain white copy paper
- A lined legal pad
- A file cabinet

Clear Workspace, Clear Mind

One of your primary self-organization goals is to maintain a completely clean desk. This means that the only items that require action, only the items you're currently working on, should be on your desk right now. If you're in your office, stop for a moment and look around you. Where are the items, information, papers, etc. that require action on your part? Every one of those things is quietly distracting you, calling to you unconsciously like little billboards in your office. You likely don't even notice. You probably won't notice, in fact, until they're gone. Remember the refrigerator? You're getting closer to turning its noise off! It is not an exaggeration to say that a cluttered office is a cluttered mind. Depending on your level of clutter, this may be a weekend job or it may take months, but you must keep at it to realize the results. Clean desks aren't just for perfectionists; they are for people who do serious work that requires intense focus. While your Technician is fine with pile of papers everywhere because it helps you feel busy, your Manager and Entrepreneur need that kind of environment in order to thrive.

Familiarity Breeds Contempt

One of the main obstacles in the way of maintaining a clean desk is that many people use physical objects to remind them to do things. This is a reasonable but ineffective habit for a number of reasons. First, the thing in plain sight silently nags at you while you're doing other things and dilutes your focus. The result is that you have to ignore it actively to some degree to focus. Eventually, the thing will possibly become part of the furniture of your office because you've become so good at ignoring it.

Have you ever put something in plain sight to remind you to act, and it stayed there for days — or even weeks — before you did something with it? This method of reminding yourself is limited by physical space and is not scalable. In other words, there are only so many things you can place around your workspace to remind you what to do, and eventually the physical placement loses significance. One piece of paper quickly becomes a stack, and while you may know what's in the stack, it's far from prioritized and quickly becomes a source of overwhelm.

All About Files

In order to keep a clean desk you'll find that one of the most important tools at your disposal is your filing cabinet. It's where all of those stacks of paper should be. Yes, even the ones you use regularly. There's a tendency for people to use their filing cabinets for things that need to be saved but not referred to often, like a kind of archive. This is passive use of a file cabinet that just results in clutter. It's a missed opportunity.

Let's look at this critical but unappreciated system called the file cabinet in detail. Filing has to be easy (and even fun) for it to work properly. If your files are a mess or your cabinet makes the sound of fingernails on a chalkboard when you open it, you're simply going to avoid filing.

We want to take away as many barriers to being organized as possible here, so let's start on a practical level. Your cabinet has to work. Your file cabinet needs to be within arm's reach, within office chair "swivel distance." If you have to get up and walk across the room to file or find something, you're going to resist. Also your file cabinet needs to open and close like the door of a luxury automobile. This might be as simple as greasing its tracks or it might require you to buy a new one. This is no joke. Do whatever it takes to have a file cabinet that you love using, or else you'll be creating piles on your desk unconsciously — maybe you already have been for that reason.

Your file drawers must be less than three-quarters full. Anything fuller than that is another barrier to entry. An overstuffed file drawer is a recipe for overwhelm. You may need to buy more file cabinets. It's worth it. But before you do, you'll probably be purging a lot of files you do not need, so that decision will come later.

The structure for your files should be one A to Z system. Do not bother with categories except in unusual circumstances. Categories result in too many options that will slow you down and cause you to resist putting things away in the first place. Also, those little plastic category dividers where you have to slide in a slip of paper are not worth the trouble. You can use them to segment "A to E," "F to L," "M to S," and "T to Z" if you prefer, but beyond that they're worthless.

All of your file folders must be typed — no exceptions. You read typed print faster and more easily than handwriting. And forget about colors, it just adds a level of complexity. Decide on a single font and size, and use a label maker. If you need to convert a large numbers of handwritten files, consider using your computer. A word processing application and printable labels work great. It's much faster than doing each one on a label maker, and most file folder labels have online templates you can download from the web.

Avoid using hanging files if you can.
If your file drawer has a moveable partition that can be easily adjusted front to back, you can use it to hold up your manila folders. This is ideal, but not critical. Not using hanging files saves you the step and the expense. But if your cabinet or drawer requires hanging files, then...

Each manila folder gets its own hanging file.
This one is critical. The one to one ratio of folders to hanging files keeps everything at the same level, allowing you to easily see the folder labels. Which cut tab you use won't matter this way, because they'll all be easily visible. You won't have to find the right folder for the right place, saving you time and effort. If your file cabinet can hold manila folders without the use of hanging files, this is even better, but not necessary.

Do not overstuff your folders.
Too many papers in a folder will cause it to rise up out of the drawer. It's imperative that everything is the same height for quick viewing. You may need to use additional folders and hanging files for the same subject and that's OK. Just group them all together and label them properly.

You'll want to have plenty of new, clean manila folders and hanging files (if you're using them) on hand. When you have this system properly set up, you'll be able to create a typed file label or find a file in under a minute. No kidding. This is the standard. If it takes you any longer than that, something is wrong and should be addressed. You'll soon see that your inadequate filing system has

caused you to avoid using it and is directly responsible for much of the clutter in your workspace (and so the clutter in your mind).

Now you want to purge your files. This should be done once a year. Schedule it in your calendar as a recurring appointment right now. If you're not sure what you can throw away, you can start by archiving files you rarely use and moving them to storage. You can always find them if you need to. Files that are truly storage (like old tax returns or inactive contracts) should be moved to your archive. You want your day-to-day filing system to be alive, active and neat. Cut away all the dead wood or else you'll be distracted by those things and diminish the value your filing system can have in your life.

When you first sit down to go through your files, you'll have many little decisions to make. "Do I keep this?" "What should I call this file?" Over and over. This is why you'll want at least three hours to focus at this level of attention. Put on some music, have a double cappuccino. Have a good time with it as best you can.

You probably didn't know that one of the primary causes of your messy desk was a poor filing system. Now you can go about changing it. Your desk will still get cluttered from time to time, but with practice and discipline you will improve more and more. Besides, with the right systems in place, it only takes a few minutes to clear your desk off because you've got places items can go to that you trust.

43 Folders or Tickler File

While on the subject of files, there is a very useful tool that can be a critical piece of your filing system. A tickler file is a file folder system that allows you to store paper or other physical reminders so that they will pop-up on the date that you want. As its name suggests, it is made up of 43 folders: one for each of the 12 months, and one of each of 31 days. You have about 30 day-buckets ahead of you to file things into, and 12 month-buckets as well. How does it work? Maybe you got a flier for carpet clean-

ing that you wanted to inquire about a week from now. It doesn't make sense to create a file for "carpet cleaning," but we know that the flier shouldn't be on your desk either. Using the tickler file, you can quickly slip it into the day you want it addressed, and forget about it until then. This is a great system for things like theater tickets, travel itineraries, maps — anything you want to consider in the future. You can even make a note to yourself on a post-it and file it in your tickler file to remind yourself to do

something on a certain day. It's like setting up your own personal post office to have things delivered to you on the day you need them.

Creating a Tickler File

You'll need 31 left cut tab folders and 12 center cut tab folders. Label the 31 folders with numbers 1 through 31 for the days of the month. Label the center tabs for each of the 12 months. Remember, if you're using hanging files, each folder gets its own file.

When you're ready to file them, arrange them as follows. The day files are kept in front, with the months behind them, in order. From front to back, if today were October 12, then you would have the number 12 through 31 folders in front, followed by the November folder, followed by numbers 1 through 11, followed by December and so on.

Each day, you empty the contents of the current day into your inbox and move the empty folder (with its hanging file) behind the following month, November in this example. So on October 12, you empty the contents of the 12 folder and move the empty folder behind the 11 folder so it now represents November 12.

Use the month folders for filing, they're not just place-holders. On the first of the every month, go through the month file and either process the item or move it to a day-file for that month as appropriate.

It may sound complicated, but it's actually very simple. Even if you don't use it very often, the things you do use it for will make this system worth your while. It takes a bit of time to set up and get used to, but literally requires seconds once you get it going. Obviously, for the system to work, you need to remember to pull the day's file every day, or else your brain will not trust the system and you will not use its full potential.

Inboxes & Processing

Using Inboxes and Processing Work

Modern workspaces typically have two inboxes: the first is your email inbox and the second is a physical inbox. Let's address the best practices for your email inbox first. First of all, it's critical that your email inbox is your own. Do not share email addresses. This creates confusion and duplicates work, not to mention that people never know whom they're really emailing when they click send. Even if you share access to an "info@yourcompany.com" account, it must be clear who is primarily responsible for the account. (Remember that if everyone is responsible, no one is really responsible at all.)

One of the most common misuses of the email inbox is using it as an archive. Some people collect literally thou-sands of emails in their inbox. Not only is this an IT disas-ter waiting to happen, it's a habit that causes low-level overwhelm. Your goal every day should be to empty your inbox completely. Your goal is "inbox-zero" each day. Even if you only reach this goal a couple days a week, you will be in great self-organization shape.

Like with your filing system, you may have a significant amount of purging to do. Email folders can be a big help here, but be careful to not overuse them. If your email program allows you to set up rules, use them! Rules set actions that will be performed automatically after receiv-ing a message based on whatever criteria you set. You can set a rule to send all email from a specific address, or any email that contains certain words in a subject line, to a pre-determined folder. This will help you skim your in-box and prioritize. For example, you can create folders for your key people and automatically route all their emails to respectively named folders. This will allow you to read many emails from them and reply with only one. Another example is using a rule to send all emails that you are only "cc'd" on to a specific folder. If you get distributions like newsletters or other recurring information, you can create rules to automatically send them to email folders. There are many possibilities. Ask your IT person and/or your coach for ideas.

Electronic Organization

Of course, good organization applies to your computer desktop as well. Though the medium is different, the principles are the same. You should be able to find any file or folder in under a minute. Just like your physical desktop, your computer desktop should also be uncluttered. Too many icons on your desktop will only be distracting.

Take the time to name files meaningfully and use folders liberally. You should already have folders for your EMyth Coaching materials titled by the Seven Dynamics. Many of our clients use these same categories for all of the work they do in and on their business. Avoid saving documents in places other than specific folders. You wouldn't throw loose paper into your filing cabinet, so don't save a document on your computer without putting it in a specific folder. Most disorder on hard drives comes from not taking a few seconds to think through where something belongs.

Just like with your physical files you should also create an electronic archive. If hard drive space isn't an issue, you can create an "Archive" folder for items you no longer use, but are afraid to throw away. It's a simple way to de-clutter your files and folders. You can also purchase external hard drives with loads of space at very reasonable prices. These make perfect archive and back up vehicles for your data.

Speaking of backing up data, all of your data should be backed up daily, if not hourly, ideally via Internet to an off-site location. There are many companies that provide this service inexpensively and the cost is well worth it. Hard drives are on borrowed time after about three years, and you never know when (not if) yours will crash. When disaster strikes, you can't spend multiple days recovering and rebuilding your data. You'll need to get back online ASAP, and the cost of data "insurance" is well worth it.

Email Inbox: Reading vs. Processing

Depending on the nature of your work, you may find that you use your email inbox as a staging area. A place you keep things when you're deciding what to do with them. Don't do it. It quickly results in the "familiarity breeds contempt" syndrome and you'll waste time looking at the same thing again and again. Or you'll just ignore it. Have you ever left an email in your inbox for a week while you decided what to do with it? It's that kind of thing that clutters your mind, and you probably don't even know it. As long as your inbox is full, you will not be able to relax. You'll be, at the very least, subtly overwhelmed. You'll be amazed at how different you feel when you have your inboxes at zero. You may not have everything done, but you have everything in its place, ready to be processed.

Now let's look at the physical inbox. One of the most profound wastes of time in the domain of email has to do with reading email instead of processing it. The best time to respond to an email is right after you read it. The first time. The general rule of thumb is the application of the "two minute rule." If something comes up, email or otherwise, and you can handle it in less than two minutes, you should handle it right then and there.

This is not a free license for your Technician to do everything that comes up. Your Manager must make a clear choice about whether you should do what's in front of you or defer it for later. Only the Manager will actually pause to choose; the Technician will just keep doing it, doing it, doing it.

This brings up another time-wasting issue: checking email too often. The single biggest time waster in the 21st century is checking email too frequently. If your email alerts you visibly or audibly (or both) every time a new email arrives, you're constantly distracted. If you've

trained your employees to think that they can get a near instant email response from you, then you're contributing to the problem. Be very careful using email for fast back-and forth communications. If an item needs an instant response, use a phone, instant message or text message.

Unfortunately, you may have your email infrastructure set up so that it distracts you easily. You leave your email program open all day. You have an iPhone, Android, or Blackberry in your pocket, accessible at a moment's notice. This is heaven for your Technician, because they will always have something to react to. Not good for your Manager and Entrepreneur. Turn the sound off, and set it to a mode that alerts you sporadically, every five minutes at the minimum. You won't miss it. You decide when to check your email, not your email program.

If the role you play in your business requires you to be in constant contact, then this is something you'll have to address strategically over time in order to be freer of the business. In the beginning, though, insist on being as free as you can. Even the busiest business owners

can tell their people not to expect to reach them for an hour or two a day. If you don't know how to achieve this, strategize with your coach. It's critical that you're uninterrupted for at least an hour or two a day to do your business development work.

So, to the degree possible, turn off your email reminders, close the program, turn off your phone and avoid checking your email more than five times per day. You'll find you get a lot more done, are less overwhelmed and more focused.

When you do proactively choose to check your email, don't just read it, process it. Remember, the goal is inbox zero. Reply immediately to what you can reply to and delete the message. If you need to defer your reply, consider moving it to an "ACTION" email folder. Another folder that is useful is a "WAITING FOR" folder for things you have delegated or otherwise are waiting for. To move these folders to the top of your email folder list, put a 1 or an @ before the title.

The Physical Inbox

Your physical inbox should be within arm's reach and used as a "bucket" to collect actionable items. For most people, a stacking paper tray works just fine. Like your email inbox, it should be emptied every day. An unprocessed inbox is a cluttered mind.

In the beginning, the piles on your desk and around you will be moved to your inbox. In fact, all visible, actionable physical items that have not been processed need to go to your inbox if you cannot do something with them in less than two minutes. Scour your workspace for anything that may be drawing your attention and get it to your inbox for processing.

Whether you allow others to put things in your inbox is up to you. You may want to have a separate inbox in another location for such items, depending on how much you can trust others' input, workflow, foot-traffic etc. For

many small business owners, it makes sense to have an inbox outside their office so people can leave them items without having to interrupt them.

Remember also that your daily folder from your tickler file gets emptied into your inbox each morning. In the beginning it may take you a while (hours or even weeks) to process through a backlog of clutter. Remember that all of this is because you have not been effectively processing your data. You also may be taking on too much, which is a subject we'll cover later.

The basic guidelines for processing your inbox items are this:

- ▶ Process the top item first
- ▶ Process one item at a time
- ▶ Never put anything back

You may find yourself tempted to sift through your inbox to find the most interesting or fun things to do. Don't do it. This is leisurely or emergency scanning and not effective processing. If you need to scan your email or inbox for something truly time-sensitive, then OK, but don't fool yourself into thinking this is a productive behavior in general. It's in there for a reason and it all has to get addressed. If not now, when? If not you, who?

Clearing the Inbox

Let's look at your basic options for decision-making with respect to anything in your inboxes. Remember that the point is to get things moved to the appropriate place so that you can process everything in your inbox in a timely fashion.

Trash It

If you're the kind of person that has a hard time throwing things away, you're causing yourself ongoing overwhelm. Part of being an effective Manager is honing your skill of discrimination, and making quicker decisions about what can be thrown away. So go ahead and make that decision to trash the things you can. If you're unsure and/or fearful about throwing something away, a less permanent commitment is to archive it. But archiving it comes with a price: you must make a deal with yourself that you'll put it away for a set amount of time and if you don't need it when that time is up, you'll throw it away. The most important thing is that it's out of your workspace during that time.

Delegate

The principles of delegation are covered deeply in the Management processes and are supported by a number of key systems you will soon have in place. In the meantime, here are some easy-to-use ideas to get you by. Think of delegation as an agreement on the answers to three questions you ask of your employee.

▸ What will you do?
▸ By when will you do it?
▸ How will I know it's done?

When you consider delegation problems you've had in the past, you will find that a lack of clarity in one of these three questions is usually the culprit. The task wasn't clearly defined, the deadline was unknown or the nature of the reporting loop was confused. Remember too that delegating is different than abdicating. As the manager, you're responsible for following up. You can use your calendar or tickler file to hold the commitment so it does not take up space in your head.

On Hold

If you decide that it's appropriate to put the next action off for now, it needs to "live" somewhere besides in your head. This could take the form of your tickler file, your calendar, or as we will discuss, the "someday/maybe" section of your Project List. The point is that putting something off doesn't mean you have to hold it in your head until it's done. Move it to the appropriate "on hold" place and address it at the appropriate time. It's critical that your mind remain clear.

Get it Done

The best thing you can do is simply get the action done. Finish it and get it out of your head and off your calendar. Move whatever project it's associated with forward. But again, observe the two-minute rule. There's rarely a reason not to do something that takes less than two minutes if you have the time. This idea alone has the power to dramatically change the way you operate. You will begin to improve your ability to really "process" your work items and not just sift through them semi-aimlessly. One at a time, methodically, striving for the bottom of the box.

When you begin to enjoy the mental clarity that comes with empty inboxes, you'll be more motivated to keep them that way.

Remember, all of this is setting the stage for the development of your business. You can't effectively work on your business without being extremely well-organized. Your Technician will consume your Manager and Entrepreneur space unless you mind is clear.

The Project List

As a small business owner, you're pulled in many different directions. You're responsible for any number of very different aspects of the business. It's a lot to keep your head around.

That's a big part of the problem.

Your head is simply not big enough to get around something as large as your business. Without realizing it, most business owners simply exceed their brain's capacity for holding commitments, and then assume that this level of overwhelm is simply par for the course. It isn't. The good news is that you now have a system that can give you a different experience of yourself and your relationship to

your business. It's called your Project List and it's one of the key tools for staying on top of all there is to handle.

To create an effective Project List you need to begin with some kind of digital outlining application. There are a number of such applications on the market, but if you have a recent version of the Microsoft Word program, then you probably already have what you need. You want your list to be collapsible so you can look at everything from a high level easily. This is what makes your outline different from a simple numbered list. Microsoft Word has an "Outline" view that is ideal for this purpose. Ask your coach if you need help finding this or learning how to use it.

Projects and Next Actions

A project is anything that is made up of more than one action. This is an important distinction. Many times people get hung up when they have a project on their to-do list rather than the next-action of that project. For example, "Clean Garage" sounds like a next-action, but how many times have you had this on your list and it just sits there, undone? The reason is because when you look at this item, a handful of other items come to mind: you need to buy storage boxes, you need to make a junk pile, you need to see if your spouse is finally ready to sell that juicer, etc. In other words, "Clean Garage" is not a next action, it's a project made up of a number of steps.

The solution in a case like this is to brainstorm all of the next-actions and put them in order so you can begin processing through the steps one by one. Where do you do this? You guessed it, in your Project List. Here's what it might look like:

CLEAN GARAGE

- ▶ Make junk pile in driveway
- ▶ Call to have pile picked up
- ▶ Buy storage boxes
- ▶ Pack things in boxes
- ▶ Stack boxes
- ▶ Sweep floor

The larger project has been broken down into smaller, more digestible chunks. Now that the smaller steps are identified, you can also see possibilities for delegation. You don't need to plot out all the steps unless your head is swimming with them. Remember, the clarity in your head is your guide. Usually, just the next two or three actions are all you need to plot. The larger the project, the more you'll probably download from your head into your Project List.

Your Project List can serve you in other critical ways as well. In addition to ALL of your projects, large and small, your Project List should contain the following categories.

Agendas

This is a great place to store items for discussion with key people that you meet with regularly. At the very least, you'll want to have a line item for each person who reports to you directly. For example:

AGENDAS

Bob:
- Delegate storage box purchase
- Give feedback about TPS report
- Follow up on Pensky file

Julie:
- Resolve Vanderlay account problem
- Delegate packing garage boxes
- Follow up on fulfillment system development

This allows you to use your Project List as a capture tool for agenda items. A few minutes before your meeting, you can take a look at your agenda and bring the items to your meeting.

Someday/Maybe

This is the place to store all of the good ideas that you do not currently have time or space for. Things that you might someday, maybe, want to do are common culprits for taking up space in your head. Because you're not ready to commit to doing it and putting it on your calendar or to-do list, it will just float around in your head. It needs a place to live to get it out of your way. This may seem strange, to formalize things you're not even sure you want to do, but paradoxically it's the things you're not sure about that you tend to juggle in your head the most. Everything must come out of your head, especially these items. Everything, from the "on hold" items in your inbox to learning Japanese, kayaking around Manhattan, opening another branch, redesigning your website, etc. Anything not on an immediate time horizon lives here. Some of these things you may never do, and that is fine. The most important thing is that they're no longer clogging up your head.

Waiting For

Some people find having a "Waiting For" list is useful on their Project List to track accountabilities of other people they are waiting on. The other option is using your calendar, which is more time-specific, to track other people's accountabilities. Whichever method you choose, it's critical to delegate with a follow up plan so you aren't simply abdicating.

Work-Life Split in Self-Organization

Creating your Project List for the first time is nothing less than a complete download of all the to-do activities on your mind. That's the point — to get everything out of your mind and into a system that can hold it for you. Everything you have going on in your life and business should be on it. That's right: your business and your life. You may be tempted to leave out personal projects or to create a separate Project List for your personal life. This is a bad idea.

It may sound strange to combine work and personal in this list, but doing this will reduce your overwhelm and increase your freedom to choose your role in your business. It is critical for you to have all of your projects in front of you so you can make informed decisions about what you can take on and where your focus needs to be.

One of the most common outcomes of creating a Project List is that one sees in crystal clarity when they have taken on too much. If your personal projects are in a separate document (or not in one at all) this important realization may be obscured from your view. Again, the objective is to eliminate your overwhelm. Everything you're working on in your life and business must be represented in this list.

You should also only have one calendar for the same reason. Many electronic calendars offer color-coding to allow you to easily view different categories of events. This is as separated as your work and life appointments should get. Using separate calendars for work and life is a recipe for overbooking, double-booking and general overwhelm because you can never really get the complete view. You'll always end up feeling behind to some degree.

Using Your Project List

Once you have literally everything organized into your Project List, you'll begin to feel less overwhelm. That is, unless you see, for the first time, that you've taken on far more than you can handle. If that's the case, work with your coach to get clear about exactly what you need to be working on and not. You may find yourself dragging a lot of projects into the "Someday/Maybe" category, and this is a good thing. Don't feel bad about doing this. It's more productive to be working on five projects with clarity and purpose than juggling a dozen. Your Manager knows this already. Your Technician may resist this change because it won't be comfortable.

Depending on your work, you may want to look at your Project List daily, weekly or somewhere in between. The tasks you work on will either come from the next actions on your Project List or they'll arise during the day. Ideally, in any given day, you can handle the tasks that arise and still move forward on your projects. In other words, your Project List is where you brainstorm and organize your next-actions. Ultimately, what you want to achieve is that your calendar and your next-action list are what drive your actions.

Choosing Calendars and Lists

Before we talk about how to use these tools, we need to talk about what format to use. For each of these tools, you have the option of pen-and-paper or electronic formats. There are advantages and disadvantages to both, and it largely depends on your personal preferences and conditioning. Some people, especially with to-do lists, simply have to have the satisfaction of crossing something out with a pen or else it isn't real for them. Other people can't take their hand-written calendar seriously and need the structure of typed words and graphically blocked out time. You'll need to make choices about what works for you and your business and may or may not need to make a change in your habits here. Here are some guidelines for each of these tools to help you.

Calendars

The benefits of electronic calendars are many. They can be synced to smartphones, shared with employees and/or family members via the Internet or exchange servers and can go infinitely into the past and future. Furthermore, they feature recurring appointments that can be extremely useful. Many professionals today live very much according to their Google Calendar, Outlook, iCal or some other electronic format.

Paper calendars have a number of downsides. They are very difficult to share with others, often have limited space, and it's cumbersome to move or delete meetings. It is quite possible that your use of a paper calendar has been holding your productivity back. Consider moving to an electronic format if you haven't already.

Next-Action Lists

An unlined piece of paper can work just fine for this. No need to get fancy here. Some people need to physically cross things off. If you move around a lot during the day, then you may want something accessible on your smart-

phone or PDA so you don't have to worry about taking your paper list with you. There are many different to-do list software programs on the market but many of them have features that simply get in the way of your ability to quickly add or remove a task. Watch out, because you don't want your Technician to get out of control here. Spending hours finding and then more hours learning a new program is not necessarily productive. Most calendar programs like Outlook and iCal have task features connected to them. You can explore these if you're drawn to them, but again, paper is just fine if that is your preference.

Using Calendars and Lists

Once you have the main elements of the self-organization system in place, it's time to make them work together. If you're not used to using a calendar or list to work from, it may take a few weeks of self-discipline to get in the habit. Remember, your Technician just wants to work on whatever arises, not work from a plan. It's your job to show your Technician that their methods are no longer applicable.

Daily Prioritization Meeting

At the beginning of every day, it's a good idea to schedule a recurring meeting with yourself to define the days' priorities.

This Daily Prioritization Meeting is where you declare how your day is going to go. While it'll rarely go exactly as you planned, if you don't start with a clear picture, you won't end up anywhere near your goal. If your day happens within 60% of your plan, you're doing great. Only your Technician would think it could (or should) be 100%. Your plans don't exactly prescribe the course of life. Unpredictable things will always arise; just do the best you can and stay out of overwhelm.

Whether you have your Daily Prioritization Meeting the morning of or at the end of the day before is up to you.

Experiment with what works best for you. The important thing is that you have a plan for the day before the day asserts its plans for you! You're in control here.

You'll want to look at your calendar and next-action lists multiple times a day to make sure you're staying on track and aren't inappropriately derailed by something that's come up. And don't be afraid to use your calendar to schedule meetings with yourself. Most people underuse their calendars this way. Any task that has a time or day specificity to it should be moved to your calendar. In fact, anything that takes longer than 30 minutes should be scheduled.

Many people who follow this approach find that they have committed to more than they can possibly do in

a day. So when they complete each day, they feel bad about themselves and overwhelmed. If this happens to you, go back to your Project List and find some things to move to "Someday/Maybe," find delegation opportunities, or just say "No." You cannot afford to operate in over-whelm.

Teaching Organization to Your Employees

Time is more valuable than money, because it has its own kind of finite quality. You can always earn more money, but you can never earn more time. If your employees are not organizing their time efficiently, your business is missing opportunities. Not only are you leaving money on the table through inadequate efficiency, but your employees are missing out on becoming more effective, self-respecting people.

Once you're well on your way to mastering the techniques described in this process, you're qualified to bring these techniques to your employees. If your employees are interested in personal and professional growth, then they will be interested in learning to be highly self-organized. There might be some resistance to change, of course, but if you come from the perspec-tive of a win-win, then you cannot lose. The business benefits and the employee benefits from self-organiza-tion mastery.

Having learned this process, you have the power to change your employees' lives forever by giving them the skills to stand in the center of their lives and not perpetuate their own sense of overwhelm.

You may wish to wait until you delve into the Manage-ment processes of your EMyth Coaching to do this. Discuss with your coach what makes the most sense. Re-member to always guide and direct your employees from a place of supporting their best interests and the interests of the company. Your employees may resist the change at first, but just because it's uncomfortable doesn't mean it isn't good for them. You lead this in your organization by moving yourself out of your own comfort zone. By applying this process to yourself first and going through all of your own discomfort, you'll learn how to bring it to others.

The Ongoing Process of Self-Organization

It is important to note that self-organization is a process, not an attainment. There is no such thing as perfection here, as much as your Technician might want there to be. You will get overwhelmed again. Your desk will get cluttered again. It is very easy to "fall off the wagon." But when you have your systems set up properly, it is very easy to get back on, too.

So when things get cluttered again, don't be hard on yourself. Just stop and run your systems. Clean off your desk and dump it all in your inbox. Process your inbox. Get focused. The main thing is to tolerate less and less working in any amount of overwhelm whatsoever. Raise your standards for having a clear head so that you will notice more quickly when you get overwhelmed and can get organized again sooner. In the beginning it might take days or even weeks to return to a clear head. Eventually, you will be able to catch yourself faster and not get behind for even an hour before you return to clarity, focus and impeccable self-organization.

It's not about attainment or perfection. It's about remembering to stop and return to yourself when you start to spin out of control.

This process represents the nuts and bolts of self-organization — the outer workings of it. There is another side to it: the inside. You may discover that your relationship to organization is a reflection of what is going on inside of you. Maybe your Technician likes to create chaos so you can "save the day." Maybe your Technician likes being overwhelmed so you don't have to look at or feel difficult things in your life. Maybe when you're not overwhelmed you feel painfully bored or depressed. Do not underestimate the power of overwhelm to function as a kind of drug in your life. This is the root of "workaholicism" and it may be operating in you.

Pay close attention to your relationship to self-organization. Do you easily rubber band back to chaos? Are there areas of your life where you just cannot get organized? Are there certain habits you have trouble adopting? It might be that there is an internal pattern in you that's getting you stuck. You may have some limiting beliefs or values at play. This is where your coach can help you immeasurably. Do not be surprised that your implementation of this process will bring up some deep emotions and beliefs. Be open to learning something about yourself and everything will move as it should.