



Taming your tasks: Five steps to extreme productivity

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Education
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Resources



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Career Trainer to over 100,000 accounting professionals

2012, 2014 - 2018 – Top 100 Most Influential People by Accounting Today

2008 Top 40 Under 40 Up and Coming Thought Leaders by CPA Practice Advisor

Learning objectives

- Unlearning what you have learned: Productivity myths
- Clearing the way: Overcoming productivity roadblocks
- The productivity and priority connection
- Bonus material



Unlearning what you have learned: Productivity myths



Myth: You can manage time.



Truth

You manage projects and tasks considering...

- Priorities
- Responsibilities
- Outcomes



Myth: The measurement of productivity is efficiency.



Truth

The measurement of productivity is

- Outputs
- Effectiveness
- Mental Clarity



Productivity measurement – Mental clarity

White space

Boomerangs

Constantly Capture Ideas
(e.g. Using Siri)



Myth: You can multi-task.



Truth

You can perform only one task at a time.



Result of “Multi-tasking”

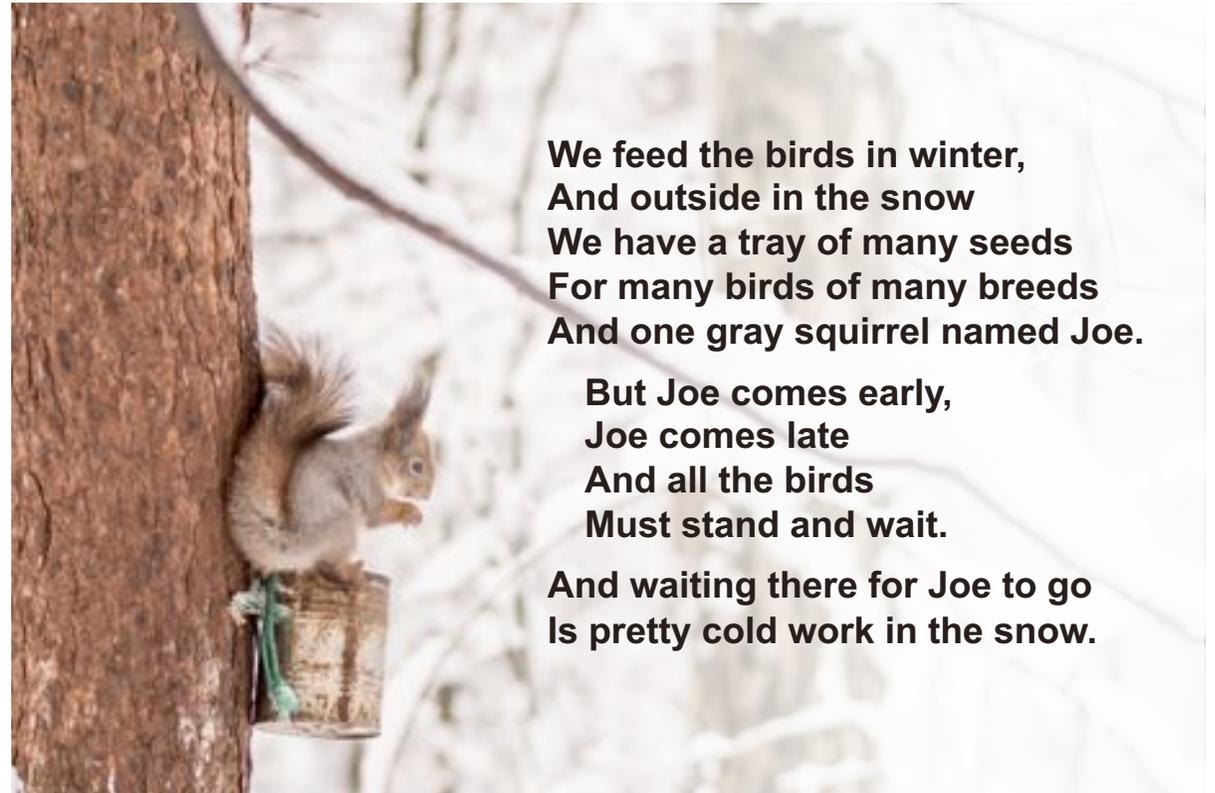
Distraction

Disrespect

Inefficiency

Diminished
effectiveness

Decreased mental clarity



We feed the birds in winter,
And outside in the snow
We have a tray of many seeds
For many birds of many breeds
And one gray squirrel named Joe.

But Joe comes early,
Joe comes late
And all the birds
Must stand and wait.

And waiting there for Joe to go
Is pretty cold work in the snow.



Clearing the way: Overcoming productivity roadblocks

Clearing the fog of negative thinking - Future

Fear, Uncertainty and Doubt (FUD)

The natural response to FUD is procrastination or even paralysis.

- The inoculator of FUD isn't courage... it is action.

Worry, Dread and Fretting

Worry is mental energy spent on things that may or may not happen.

- The inoculator to worry is planning.

Dread is mental energy spent on things that are inevitable.

- The inoculator to dread is planning, though the plan is primarily responsive.

Fretting is mental energy spent on things over which you have no control.

- The inoculator to fretting is acceptance and adaptation.

Clearing the fog of negative thinking - Present

Anxiety, Strife, and Self-Consciousness

Anxiety is negative assumptions and expectations about circumstantial imperfections.

- Inoculators to anxiety are planning, action, preparation and positive thinking.

Strife is the normal and inevitable frictions of life exaggerated by the pursuit of justice.

- Inoculators to strife are forgiveness, grace and mercy.

Self-consciousness is viewing and valuing yourself through the eyes of other.

- The inoculator to self-consciousness is confidence.

Clearing the fog of negative thinking - Past

Guilt, Regret and Remorse

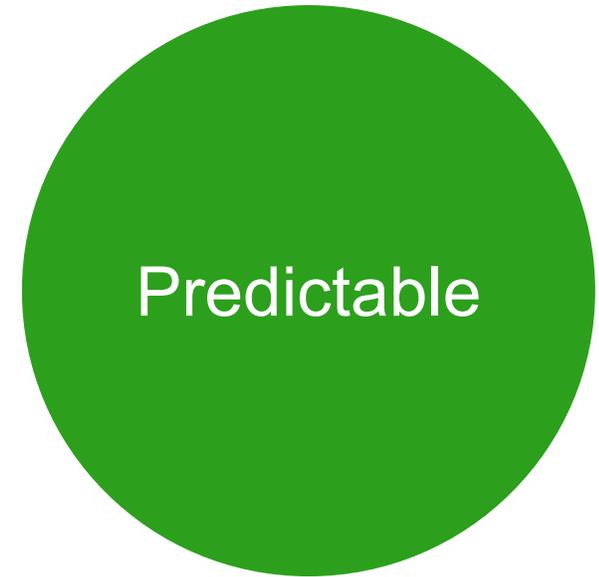
Guilt, regret and remorse are emotional baggage around past failures with no constructive value.

- Removing guilt, regret and remorse is **NOT**:
 - A failure to take responsibility for one's actions and owning the failure.
 - Dodging the impact of poor decisions (including inactions of the past).

Inoculators for guilt, regret and remorse are forgiveness of oneself and seeking the forgiveness of others.

Procrastination

Procrastination prioritizes tasks and actions solely on the basis of:



Urgency and panic neutralize the influence of fun, easy and predictable, generating action through *reaction*.

Overcoming procrastination → Reaction-based living

Procrastinator inoculators are:

- Prioritization
- Intention
- Micro-actions to jump start desire

Essential idea: The desire to perform an action/task almost never precedes the performance of the action/task.



Recommended Viewing: TED Talk by Tim Urban on Procrastination



The productivity and priority connection

Begin with your vision, mission and purpose.



“Opportunity does not equal obligation” – Andy Stanley

Eisenhower Decision Matrix



Eisenhower Decision Matrix

Set task-based goals for each day one day ahead.

Build each quadrant into each day.

Tip: Tackle the most challenging or dreaded tasks at the time when you are most alert and least distracted.





Achieving and maintaining zero inbox

David Allen's Four "D's"

Delete it

Delegate it → "Boomerang" list

Do it (including respond to it)

Defer it → Send to note solution or task

- Within the next 3 months? → Task system or to do list
- More than 3 months but date specific/sensitive → Task system or to do list
- Revisit at some future point (3, 6, 9, or 12 months) → Note solution
- Reference only → Note solution

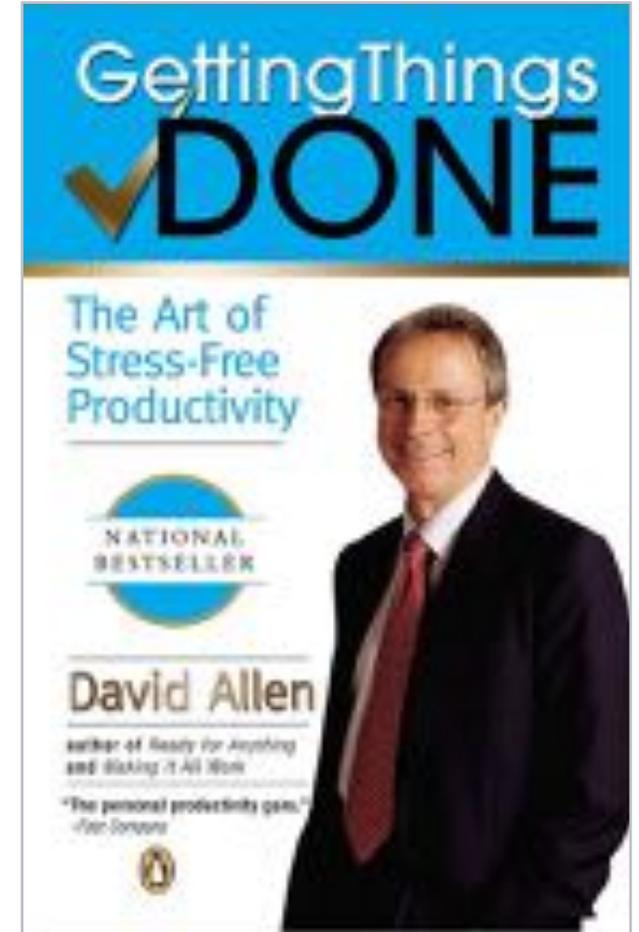


Photo Credit: productivemag.com/1to14/getting-things-done

Achieving a zero inbox

Step 1: Adopt a note solution.

- Store emails for future reference.
- Store emails where you need to track a response (email replies & delegated tasks).
- Store emails that you will act on later (deferred tasks).

Step 2: Remove all emails older than 60 days.

- Create a folder called “inbox through xx/xx/xxxx”.
- Transfer all emails older than 60 days into this folder.

Step 3: Group emails by sender and apply David Allen’s “Four D’s”.

Step 4: Experience clarity of mind.

Maintaining a zero inbox

Do's

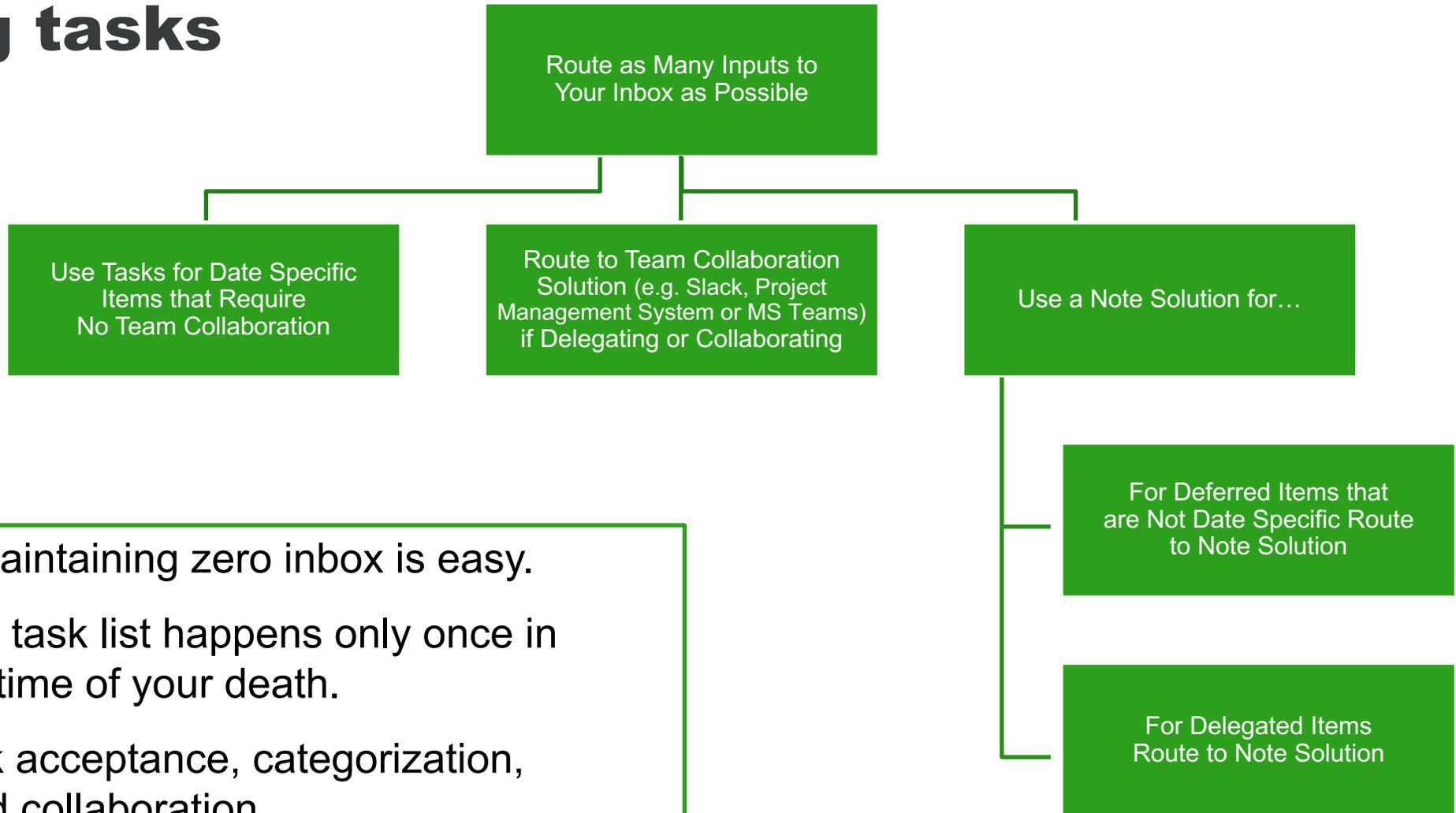
- Consistently deploy the four “D’s”.
- Trust your note solution/tasks.
- Check your lists proactively and systematically.
- If you need a reminder, set two global daily reminders - “Check Deferred Items” and “Check Delegated Items”.

Don'ts

- Do not use task reminders (except as listed above).
- Don't get behind.
- Don't tolerate even a single email in your inbox at the end of the day.



Organizing tasks



Achieving and maintaining zero inbox is easy.
Achieving a zero task list happens only once in your life...at the time of your death.
Life is about task acceptance, categorization, prioritization, and collaboration.

Five steps to extreme productivity

1. Achieve & maintain a fearless mindset
2. Categorize your inputs into collection spaces & sub-divide your project into collection spaces
3. Consistently review & prioritize your collection spaces into short term tasks and goals
4. Track tasks where you are waiting on others...and pester them as needed (“Boomerangs”)
5. Carve out protected spaces for focused work...and protect them fearlessly

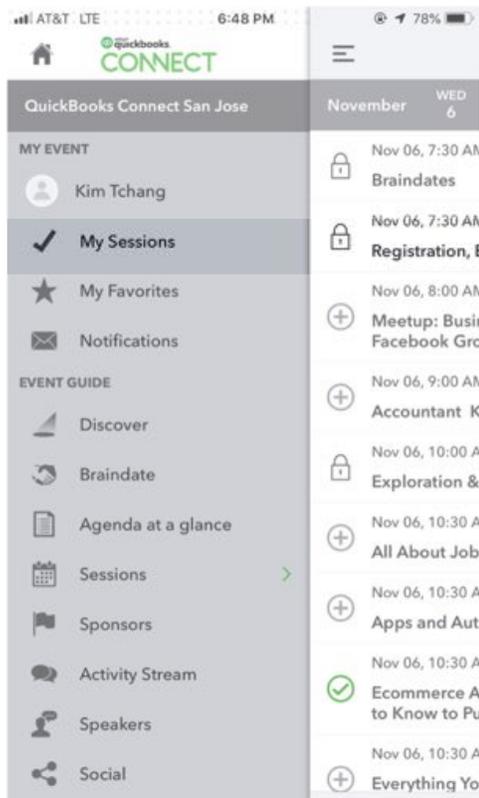


Questions?

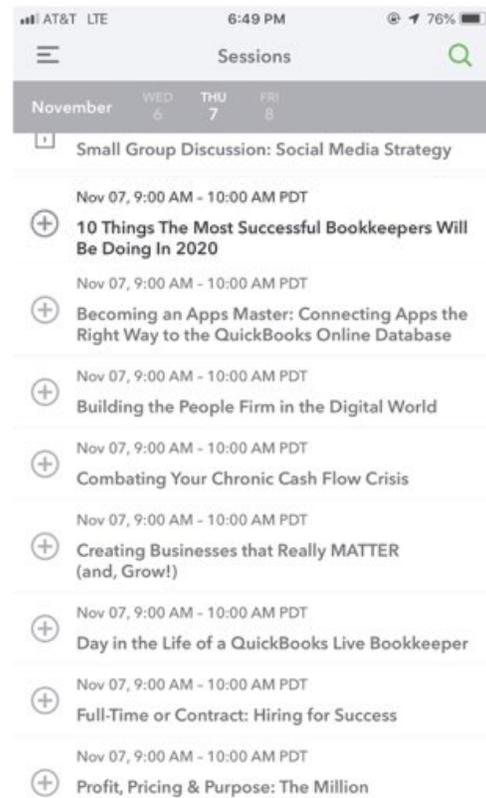
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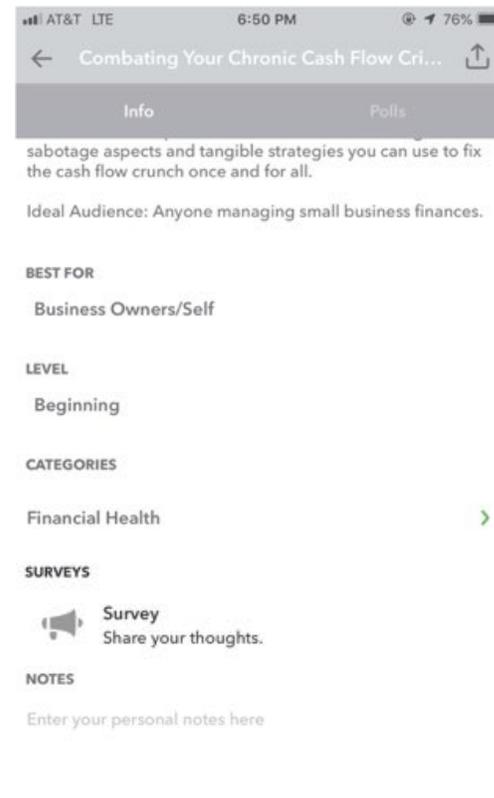
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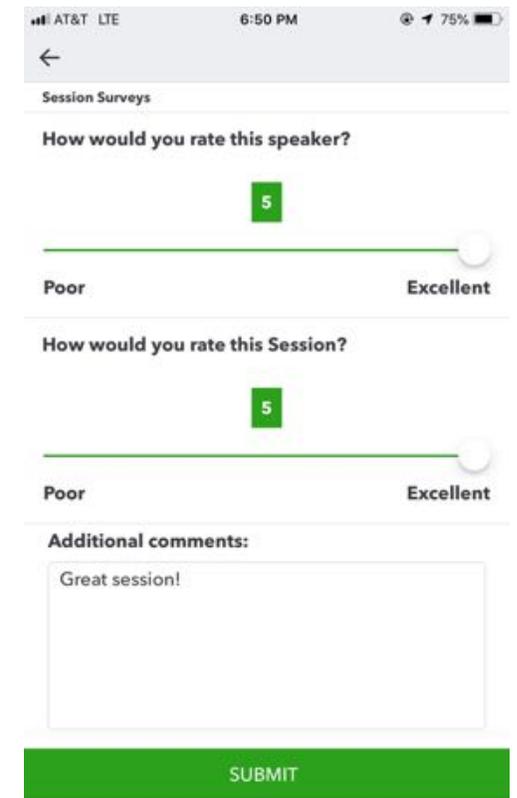
2. Select Session Title



3. Select Survey



4. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks CONNECT agenda page for November 7. The page features a navigation bar with links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. A 'Register now' button is located in the top right corner. Below the navigation bar, there are tabs for 'November 6: Accountant Day', 'November 7' (which is selected), and 'November 8'. A 'Print Agenda' button is also present. The main content area includes a search bar labeled 'Search for sessions' and a set of filters: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health'. An 'Expand all +' button is located to the right of the filters. The agenda items are listed in a table with columns for time and session details. The items include: '7:30-9:00 am Registration, Breakfast & Exploration'; '7:30-10:30 am Braindates' (with a description and 'Best for: All Audiences', 'CPE Hours: not eligible'); '8:00-8:30 am Yoga'; and '8:00-8:45 am Breakout Sessions' (with sub-items: 'Small Business Meetup: Relationship Marketing and the Power of Human Connection', 'Small Group Discussion: Social Media Strategy', 'Small Group Discussion: Showing up - Why What You Wear Matters', and 'Small Group Discussion: Build Your Dream Bookkeeping firm').

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