

Weekly Review Checklist

Set up an appointment on your calendar every week to do your Weekly Review. This will ensure you follow up, stay on task, and don't drop any balls. I do my weekly review on Thursday afternoon—this gives me time on Friday to follow through on any important things I may have missed for the week. Here is the process I use . . . modify it to fit your needs and style.

Gather all loose papers and process them.

Empty everything out of my briefcase, my physical inbox, and my wallet. I then go through each piece of paper and make a decision regarding what to do with it. Following David Allen's *Get Things Done* model, I ask myself "Is this something that requires me to take action?"

If not, I have three options. I can:

- Trash it
- Add it to my Someday/Maybe list or
- File it for future reference.

If the item requires me to take action, I can:

- Do it if it takes less than two minutes, or add it to my task list to do later;
- Defer it by actually scheduling a time on my calendar to deal with it
- Review email. Read over any email that remains in my inbox and process it with the goal of leaving no more than one screen worth of email. The closer I can get to Inbox Zero, the better, but I at least like to make sure that any sitting in the inbox are current and actionable soon.
- Delegate it to someone else for action and enter it into my task list using the "@WaitingFor" category. (This is the name of my "pending" category in Nozbe, where I am waiting on someone else before I can move forward.)

Process my notes. Note-taking is a critical productivity skill for me. I quickly read back through my notes, looking for action items that I agreed to do, and add them to my system accordingly.

Review previous calendar data. I look over the previous week's meetings in Google Calendar and see if there is anything I missed. For example, I don't usually take notes in lunch meetings, but I may want to follow-up with a thank you note or a gift.

Review upcoming calendar. This is one of the most important parts of the Weekly Review. I note any upcoming meetings with an eye to the preparation I need to do. This keeps me ahead of the curve and my assignments on track.

Review my action lists. I also try to do this daily, but during the Weekly Review I ask myself the question, "What do I really need to accomplish in the next seven days?" If it's a really important task, I will drag it to my calendar and schedule it.

Review my @WaitingFor (or Pending) list. This is a list of items I have delegated to others and are important enough to track. If something is overdue, or if I need a progress report, I send an e-mail and nudge the person responsible. I note in the task itself that I sent a reminder.



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