



Get More Done

The Complete Introduction to Task Management

by Benjamin Brandall

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Task Management?**

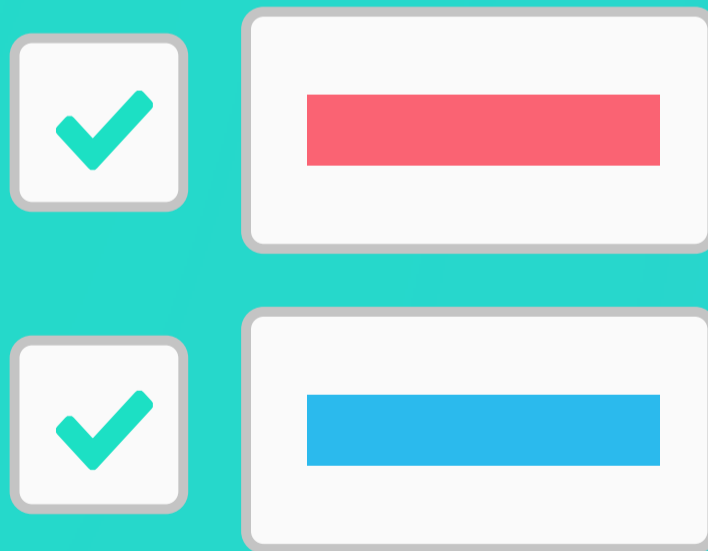
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01. What is Task Management?



What is Task Management?

3 Proven Methods Explained

The most productive people on Earth aren't superheroes. They have the same amount of hours in their day as you do, and often find [ways to work far fewer hours](#), too. How do they do it?

When I was struggling to stay on top of my new responsibilities, I was asking the same question. Over time, I discovered task management techniques, [to-do list apps](#) and [how to stay off Twitter](#) to focus on work that matters.

I'm writing this [task management](#) guide because I want to share with you what I've learned since being thrown from office grunt work to the hectic life of a startup employee. Over the next few chapters, I'll be writing a huge guide to task management that will help you write your to-do list, stay on top of your workload and get more done.

Different approaches to task management

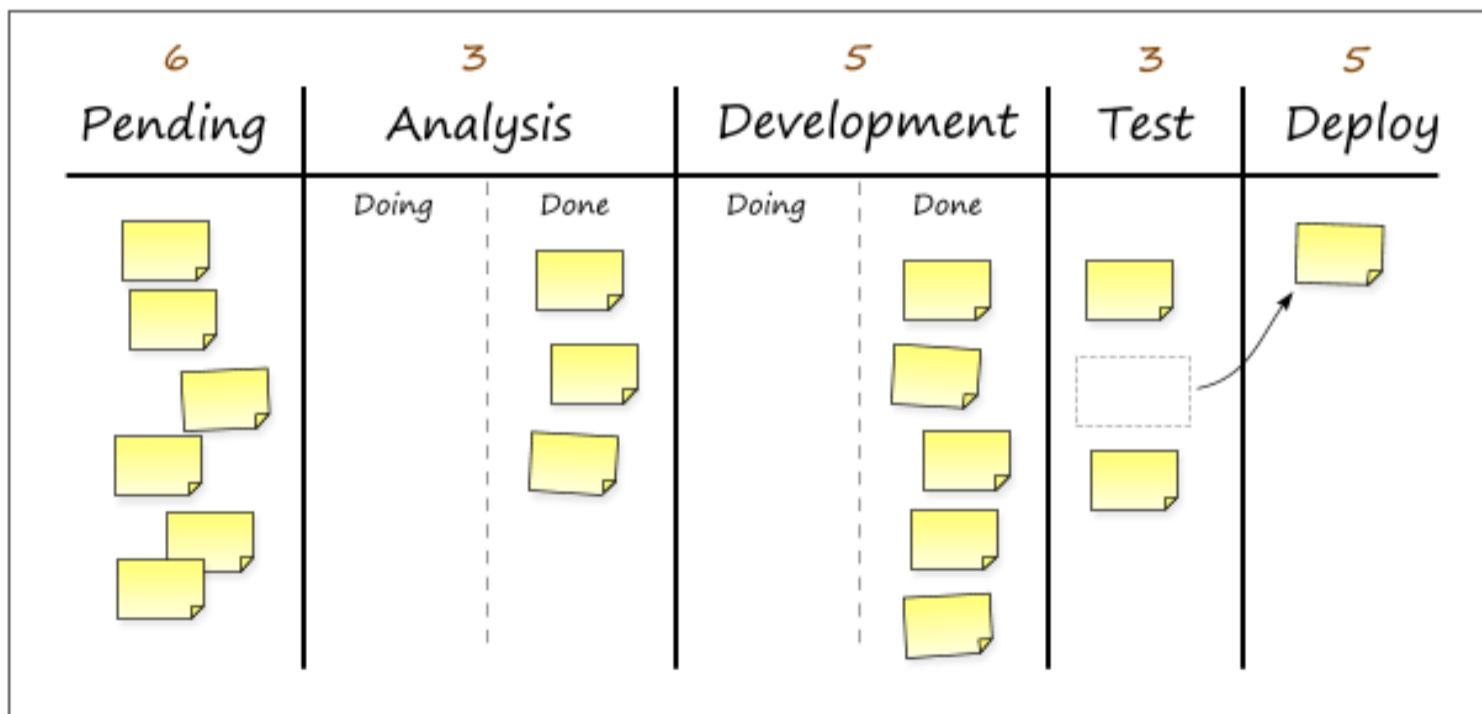
There are several major ways to manage tasks, some of which were

created to help software developers, and some for general purposes. Even the ones for developers can be applied to everyday life, and they are some of the most efficient because they've been developed by people who desperately need to stay organized and work quickly.

Here are three task management methods which make up the core of my workflow, and the workflows of millions of other people.

Kanban

Developed in the 1940s by Toyota, Kanban (Japanese for sign or card) is a task management system you'll definitely recognize if you've ever used apps like [Trello](#) or [Kanbanchi](#).



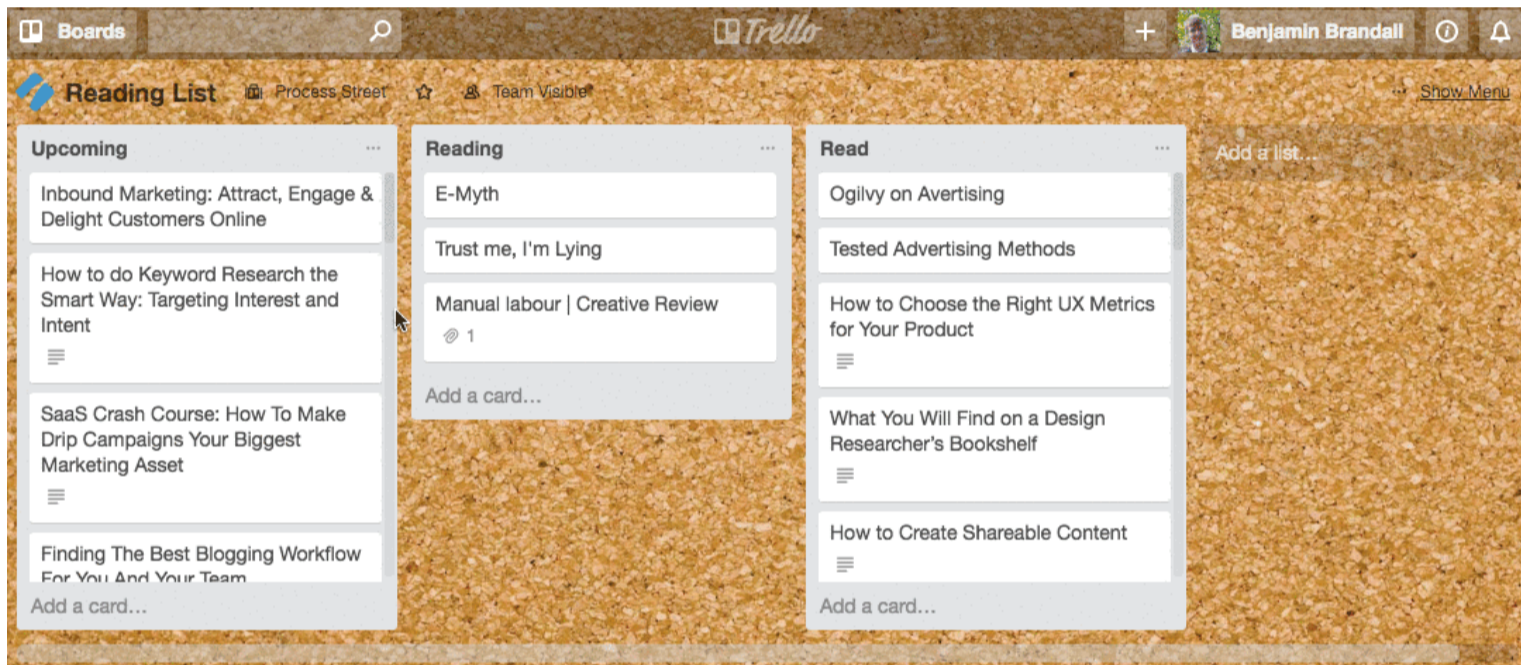
(Source: [Kanban Blog](#))

For the purpose of an example, you start off with a whiteboard and

divide it into several columns, such as ‘backlog’, ‘in progress’, ‘waiting approval’ and ‘done.’

Put all of your tasks on post-it notes in the left-hand column. As you start them or make progress on your tasks, move the corresponding post-it notes from column to column.

Here’s a simple Trello Kanban board I keep for my reading list:



While Trello is great if you’re collaborating with others (see a full rundown [here](#)), for solo task management a whiteboard can be just as effective because it’s a physical object and you don’t have to go on a website to see it.

A core principle of Kanban is to limit the amount of tasks currently in progress. Think about it this way: a physical whiteboard has a limited amount of space on it. If you want to add another task to ‘in progress’, you’re going to have to move one through the flow to make room for it.

While there’s no enforceable number of tasks you can have in progress at any one time, for Kanban to work properly, you should set yourself limits based on what you think your output capacity is.

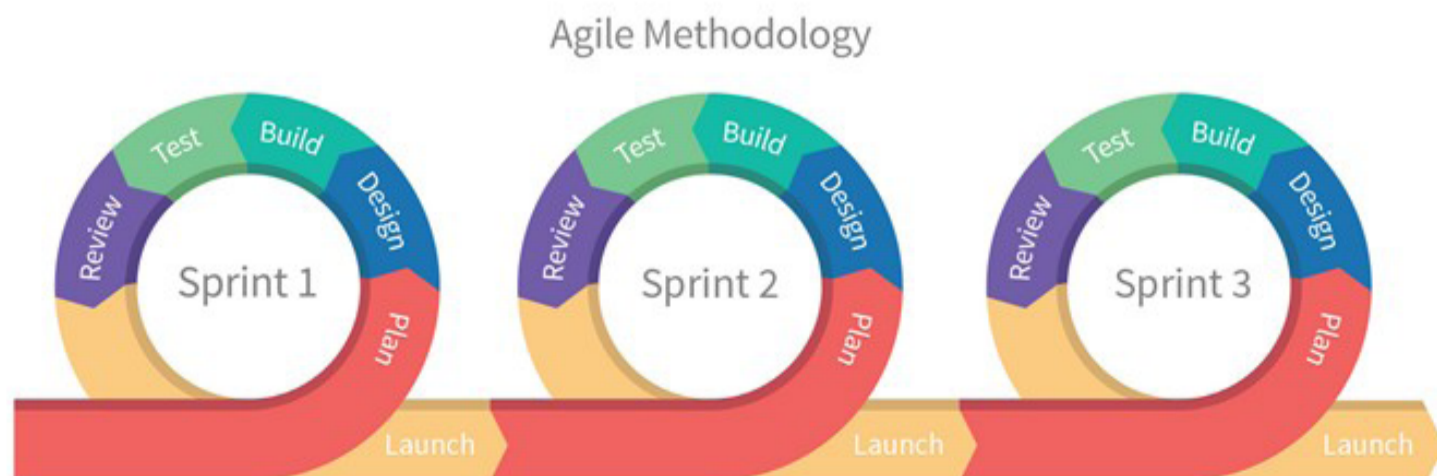
To find out more about Kanban, I'd recommend checking out LeanKit's ebook on the topic, [Kanban Roadmap](#) or this simple [getting started guide](#) from Kanban Blog.

Agile

In 2001, a small group of software developers got together and came up with a whole new way of managing their projects.

For the most part, before 2001, project management consisted of [slow, bloated processes](#) with far too many people and documentation involved. Changes were difficult to make, teams size was ridiculous and moving forward with a project was akin to the bureaucracy you'd expect to get in your way if you wanted to make an appeal to the government.

[Agile](#) sought to change all that. With smaller team sizes, short [sprints of work](#), quick iterations and testing rather than debating, it helped teams get more done with their time even if it was potentially 'riskier' than having work checked and re-checked by every middle manager under the sun.



As you'll see if you look at the [original principles of agile](#), it's not a concrete task management system like Kanban. It is, however, a set of guidelines you can work off to refine your own system.

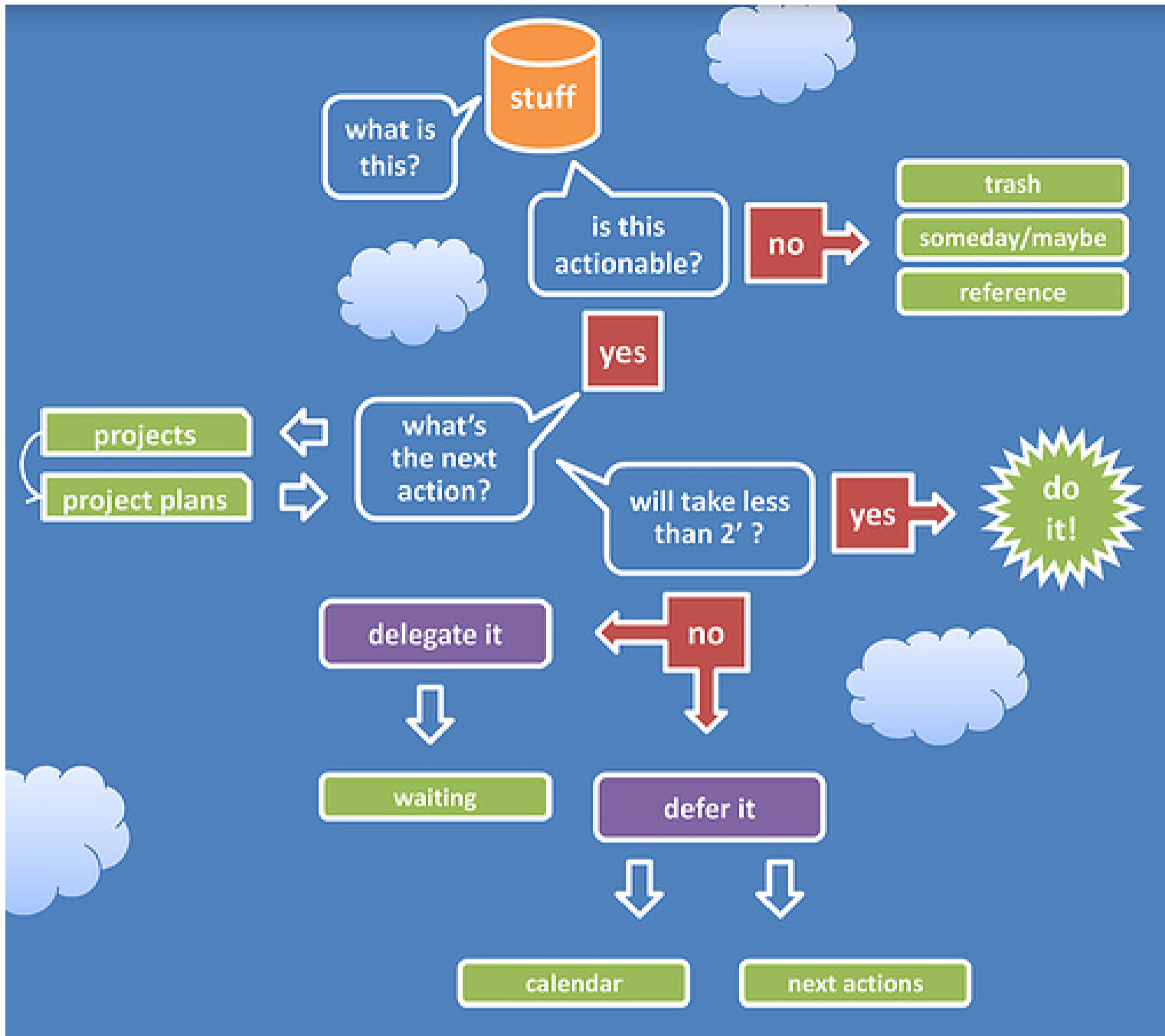
At [Process Street](#), we use a combination of Agile and Kanban, meaning we keep a Trello board of all tasks and instead of waiting week for approval we take the initiative to make improvements and iterations of our own accord, delivering small chunks of work often instead of hiding away for weeks working on a project that could need scrapping and starting all over.

If you like the sound of Agile and want to implement it for yourself, this guide will contain elements of it throughout. For a pre-made system, I'd recommend taking a look at [Agile Results by Asian Efficiency](#).

Getting Things Done

Around the same time as Agile came to be, David Allen wrote his extremely popular book – Getting Things Done ([GTD](#)). In the [book](#), he outlined a task management system with the philosophy that “the head is for having ideas, not holding them”. And that's true. The maximum number of items you can hold in working memory is [around 7](#), so if you don't write down your tasks regularly you're going to end up forgetting most of them.

The idea is to transform ideas and whims into physical actions. Based on a freeform list, you extract tasks, break them into sub-tasks, prioritize them and set yourself a deadline for each.



Once you’ve emptied your brain onto paper, you look at everything you’ve got there. You might have things like “Learn to cook”, “Take Kitty to the vets next Thursday at 2pm”, or “Start collecting Windows 98 user manuals”.

Looking at your list, mark everything that isn’t immediately actionable and start asking yourself how you could break it down even more.

If you’re learning to cook, you can’t just take one action and suddenly know how to, so you break it down. Ask yourself ‘what’s the first step here?’. It might be that you need to research cooking classes in your local area, or buy a recipe book.

For the rest of your tasks, if they are actionable and can be done in under two minutes, just do it right away. If they will take longer, now's the time to prioritize and schedule.

Working inside this methodology, you'll gradually knock out even the largest, most imposing projects and start achieving your goals.

For a 15-minute overview, check out [this fantastic guide](#). There'll also be more on GTD in the next chapters.

How can you use these methods?

Funnily enough, these methods aren't exclusive. You don't block yourself off from using Agile if you're also using GTD. In fact, I use a mixture of all three. Here's how I do it.

- GTD for formulating my tasks, creating lists and setting priorities
- Agile as a mindset, for progressing and iterating quickly
- Kanban as a way to track and visualize my tasks

I like to think of these methods as layers, with GTD as the foundation (without that I'd not have a good list of what I need to do), Agile as the mindset for getting through my tasks quickly, and Kanban as the layer that sits on top of it all, helping me get an at-a-glance overview of my upcoming, in progress and done tasks.

02.

Task Planning: Getting Tasks Out of Your Head & Into Your Notebook



Task Planning

Getting Tasks Out of Your Head & Into Your Notebook

Are you ever at a loss when it comes to planning your tasks? A good chunk of the time, I feel exactly like that.

That's ok. Task management exists because planning and executing projects is hard.

Last night, I sat down with my wife and we wrote down everything we'll need to do when we move house. It was two A4 sheets of paper before we even started breaking it down into subtasks. *Two A4 sheets of paper.*

The amount of items a human can hold in working memory is around 7, so when it comes to projects, of course you're lost if you're not planning them properly.

Don't worry. There's a simple way to do it, and once you've got that down, you've learnt it forever. And the start of it, just like I sat down to do last night, is writing everything down.

Here's how to brain dump your tasks and make sense of them.

Get tasks out of your head, and into your notebook

If you're about to start making an effort to improve your task management, it's because you have some idea of what you need to do already. The problem is that your valuable thoughts will be knocking around in your head along with useless pieces of information (like song lyrics, passing observations and 'did I forget my keys?').

A method for separating the wheat from the chaff is the good old brain dump. It's quite simple:

Spend as much time as you need to write down *everything* you need to get done. Whether that's something like 'write project proposal' or 'buy a new toaster.' Don't limit yourself on what you could write because this isn't your final task list by a long-shot; you want to keep it open-ended.

Since I do this every day, I don't have as much to write down as someone who does it weekly, for example. Here's last week's unstructured Monday brain dump:

brain dump:
Monday 17:13

Unstructured

- Should be writing an article for TC
- Have some research on Windows 98 UX, does this need organizing?
- Learn how to write brain dump
- Ben will be on tomorrow, and needs assigning two guest posts
- Need to get approval on today's guest post
- Need to properly process my Trello task list
- Check if my blog post is on the Trello blog yet
- Add a card for the employee onboarding update
- Ask Vinay for approval on the email, as above
- Write the email for Kate's post and send that today

After writing that, were pushed out of my head by useless information, then I'd probably need to spend time looking back through Trello and Evernote to find exactly what I meant by some of those items. That's why, straight afterwards, I look back through and write up a less nonsensical version.

Create tasks from chaos

Once you've got your messy list like the one above, it's time to go

through and tidy it up.

Look for any task where:

- you use a vague noun without clarifying ('article', 'post', 'email')
- it isn't obvious where the task needs to be accomplished
- there's no source, link, or enough information to act on
- you don't start the task with a verb

When you spot something that fits the bill, add **enough clarifying information** so you can start adding the tasks to your to-do list and preparing to get them done.

brain dump: Monday 17:13	Structured
<ul style="list-style-type: none"><input type="checkbox"/> Organize and write a TechCrunch article for Thursday, on Windows 98 UX<input type="checkbox"/> Read more about writing brain dumps (here, here, here)<input type="checkbox"/> Make sure Ben's guests posts on trello: Employee Onboarding are ready tomorrow<input type="checkbox"/> Get Vinay's approval on the Levo guest post<input type="checkbox"/> Download the Focus/Motivation/Energy spreadsheet from /find-productive-hours/<input type="checkbox"/> Properly process my Trello task list, Ben B Tasks<input type="checkbox"/> Check if my blog posts is on the Trello blog yet<input type="checkbox"/> Add a card for the employee onboarding update<input type="checkbox"/> Ask Vinay for approval on the Employee Onboarding Update email, as above<input type="checkbox"/> Write the email for /working-in-a-startup/ and send tht Monday 2nd May	

As you'll notice, I added links so I could easily get around to where I

need to go to learn more about the task. These links lead to [Evernote](#) notes, Trello boards/cards and research articles. I also started my tasks with a verb to make sure they're actionable, and removed any rambling details.

Break down larger tasks into manageable chunks

Big tasks are daunting. You look a task like 'organize the garage' and your brain shuts off because it's not something you either want to do or analyze. To get around that, it's best to break the task into chunks before you get started. That way, you have a clear idea of small actions you need to accomplish that will lead to you achieving your overall goal. For example:

Organize the garage:

- Move the car out
- Throw out old paint cans
- Throw out any boxes of useless items
- Stack the remaining boxes neatly
- Sweep up
- Move out items needed inside the house

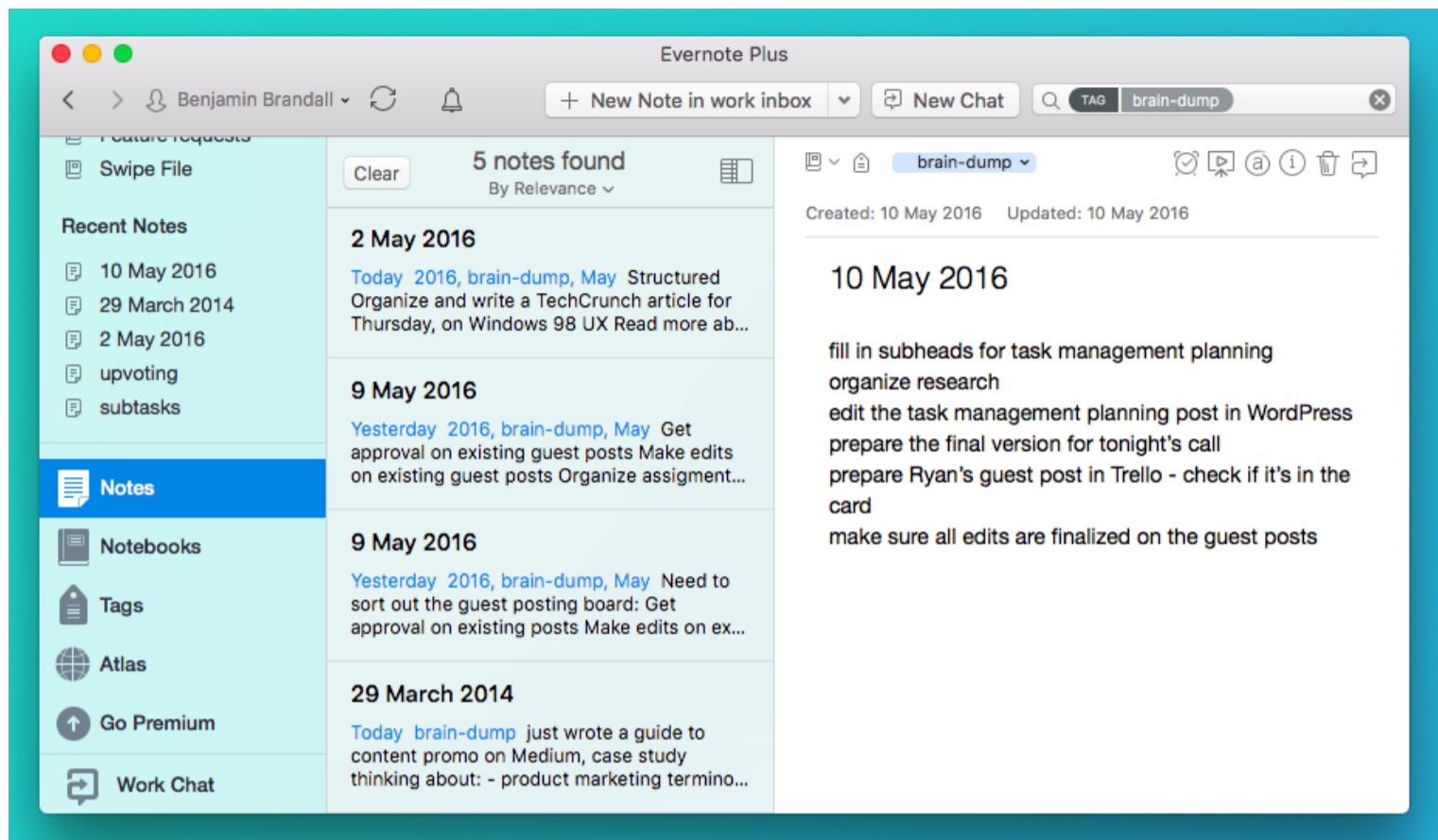
To help with breaking down a task, look at it and ask “what do I need to get that done?”. Keep going until the task is broken down to its simplest elements. Maybe starting a task is dependant on the completion of another, or you need to buy a brush before you can sweep the garage. If you can't run the task from start to finish in one go, its needs to be broken down.

Tools to help you plan your tasks

For planning your tasks, you're going to want to use any text editor or note-taking app you're comfortable with. Personally, I use [Alternote](#) linked to my Evernote. Here are a few tools I've tested out and would recommend for quickly taking notes in the preliminary stages of task management.

Evernote

[Evernote](#) is the old classic. You've probably used it, but I thought I'd take the opportunity to point out how it can be useful for managing your tasks.



Pros:

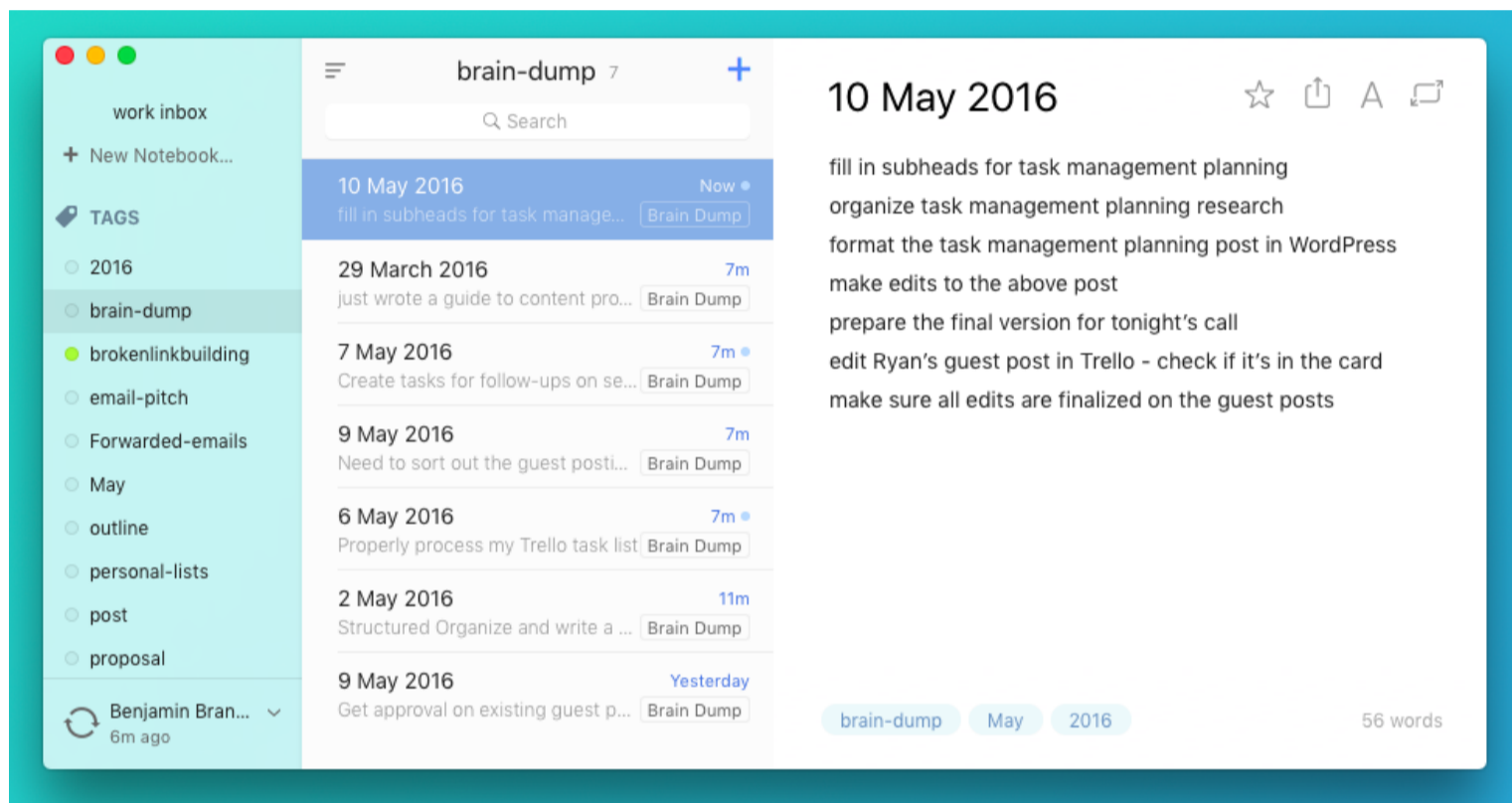
- Quickly add notes from any device (including voice notes and scanned paper notes)
- Everything is time/date stamped
- Every note is available from any device
- Powerful tagging/notebook system for organizing notes
- Everything you write is searchable from one search bar
- Integrates with hundreds of other apps

Cons:

- Evernote gets messy very quickly if you don't tag notes properly
- While great for quick notes, and more involved writing can be distracting
- But these cons aren't too bad. In fact, they can be solved with Alternote.

Alternote

Alternote isn't an entirely new note-taking app, but actually an addition to Evernote. You can sync in as many or as few notebooks as you like, which means you can declutter Evernote instantly and keep your mess over somewhere else.



Pros:

- Simple, distraction-free writing environment
- Much nicer user experience than Evernote
- Selectively sync notebook to keep your mountains of garbage out of sight

Cons:

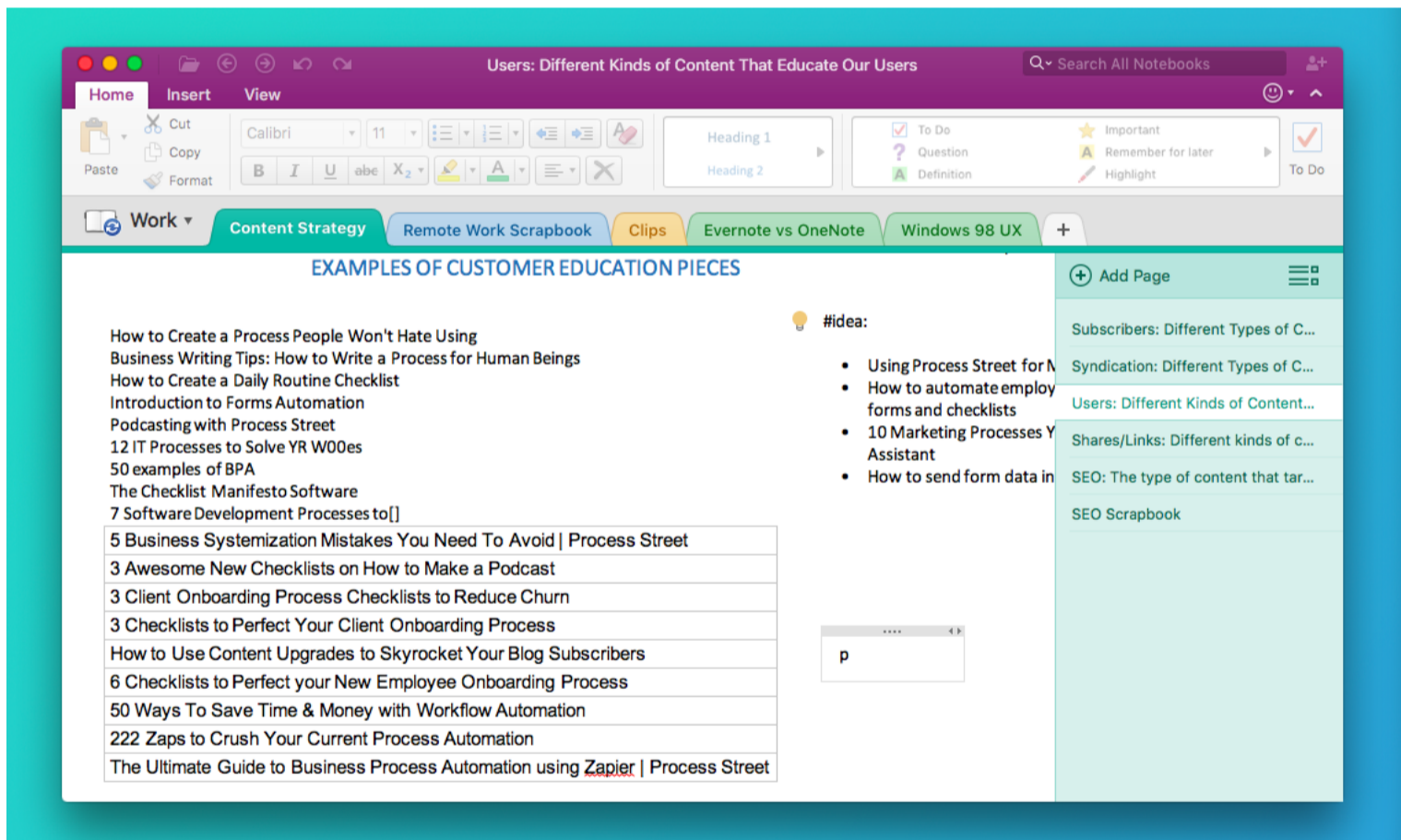
- Some Evernote features are missing, such as 'move notebook to stack'
- Mac only
- Isn't free. Costs \$6.99

OneNote

OneNote – Microsoft’s answer to Evernote – is one of the best apps I’ve found for making a digital scrapbook.

Like paper, you can drag any text box or image onto the page and place it anywhere you like. You’re not locked to a grid like Evernote, which makes it great for making notes next to each other, next to images, etc.

You can create a section for your daily tasks, and add a new page for day. Using OneNote that way, it won’t get cluttered at all.



Pros:

- Easy freeform writing
- Flexible text area
- Easier to keep organized than Evernote

Cons:

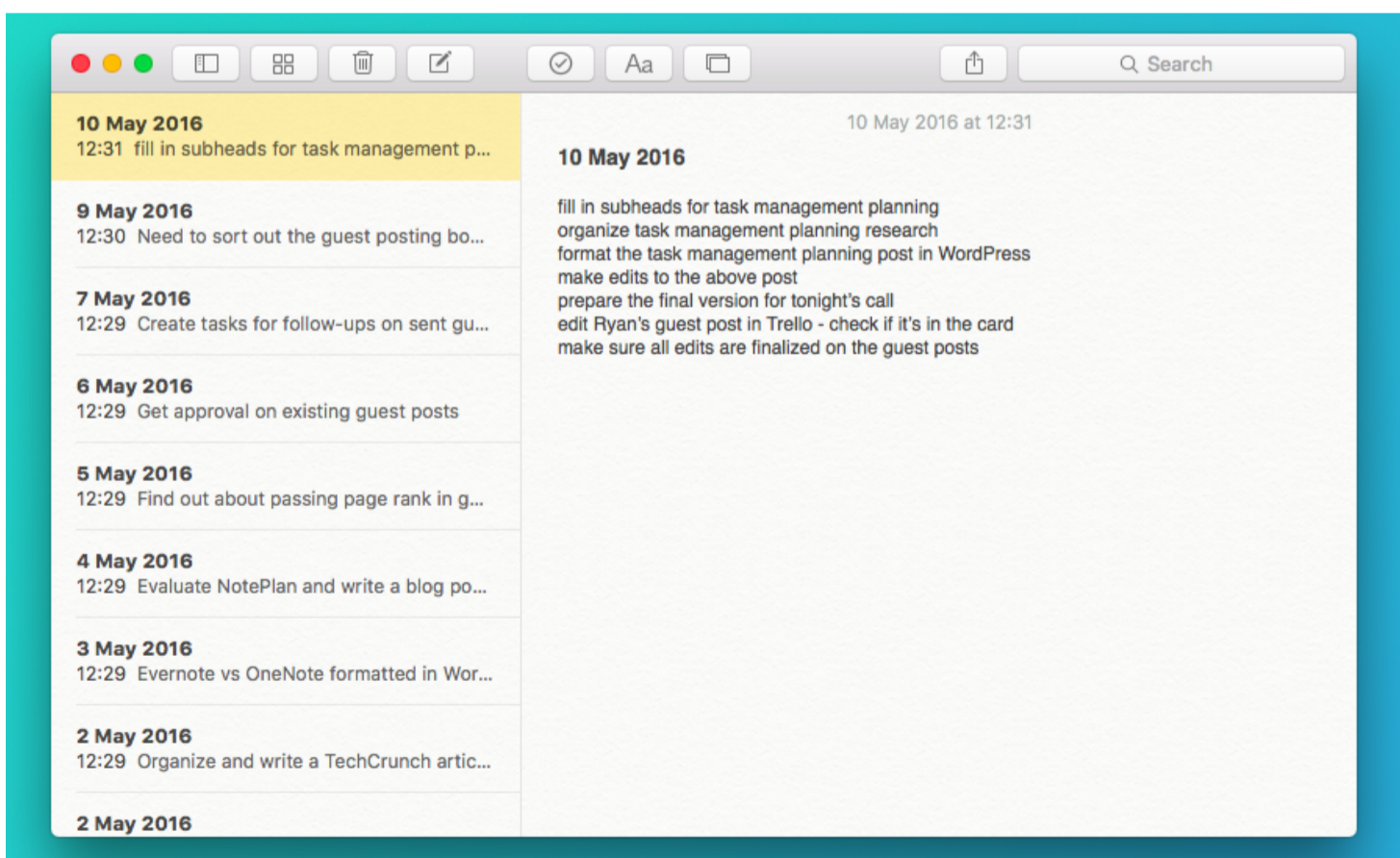
- Tagging is aesthetic, and doesn't contribute to search at all
- Search is much less useful than Evernote
- It feels a bit like Microsoft Word with a sidebar...

For a full comparison of Evernote vs OneNote, click [here](#).

Apple Notes

If you've got an Apple device, you'll get Apple Notes free with it. If not, there's no way of getting it so I'd suggest using Evernote or OneNote.

Either way, it's not like Apple Notes is the best note-taking app. In fact, it's very basic. It's divided up into notebooks and notes. For [some people](#), that's the exact right amount of complexity. For task management, you're going to want tags for projects, brain dump and resources. You're going to want to filter notes by more than just notebooks.



Pros:

- Comes free with every Apple device
- Quick to open and use
- Pure simplicity (no feature bloat)
- Filter notes by type (attachments, sketches, maps, audio, websites)

Cons:

- Much too simple for proper task management (better as a quick notes app)
- Doesn't integrate with any other apps
- In the end, I'd say don't bother with Apple Notes for this p

NotePlan

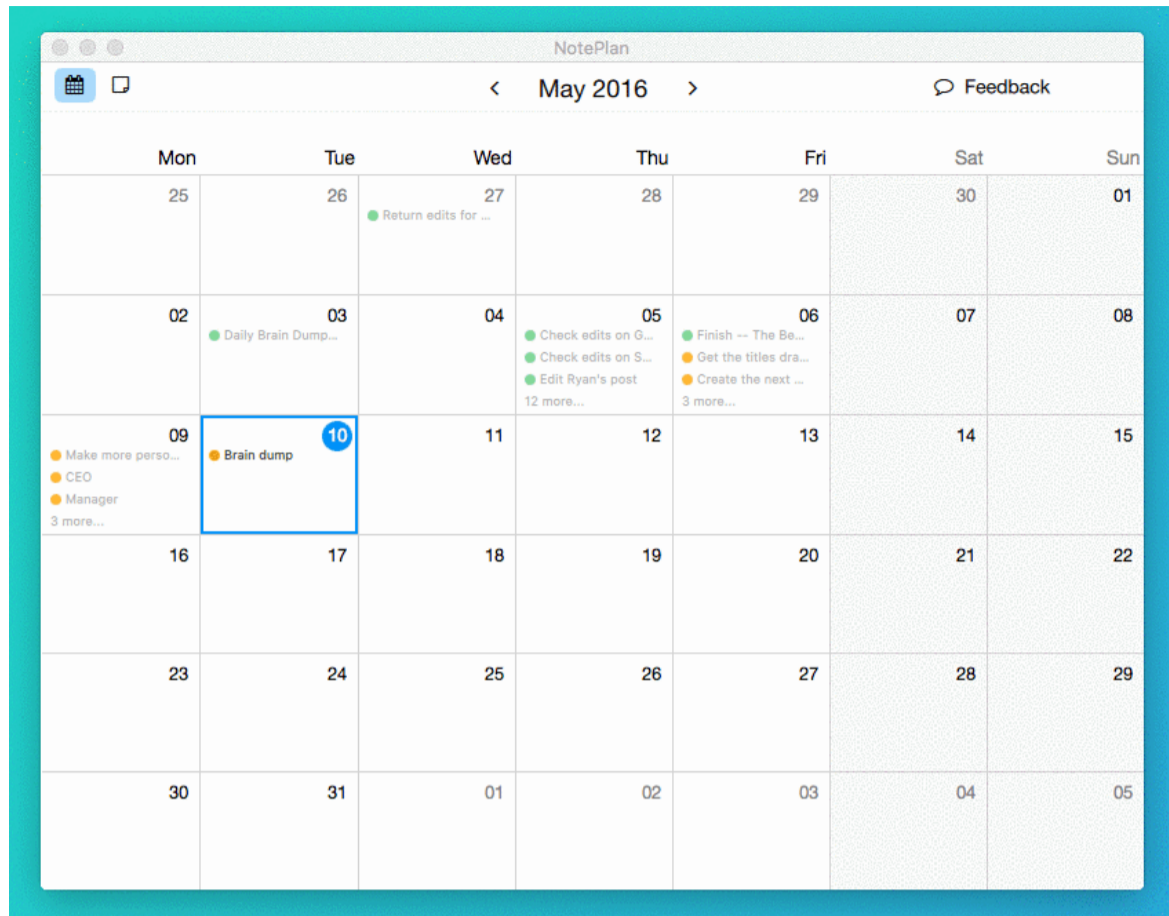
[NotePlan](#) is brand new. It's in beta right now, but looks like it will shape up to be the perfect app for brain dumps. I've only used it for a few days, but love the markdown syntax and how notes are always mapped to calendar dates.

Pros:

- The ideal app for quickly making daily notes
- Markdown syntax for easy formatting
- Free
- Easy to get around

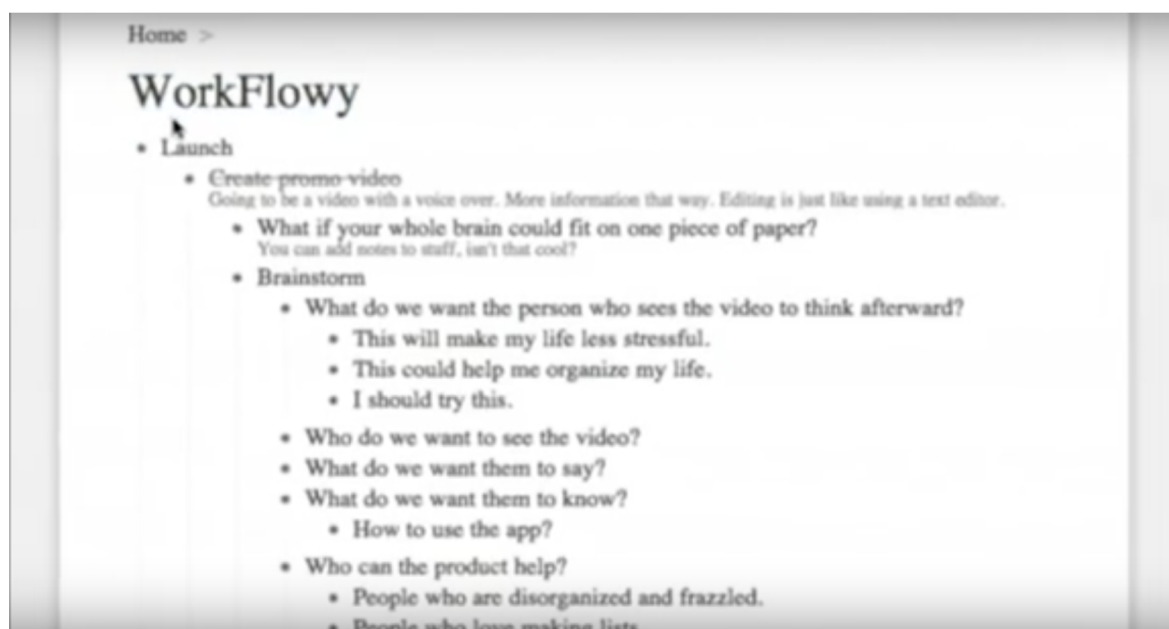
Cons:

- Small learning curve for markdown syntax
- The app is in beta. There are some little quirks to work out still.



WorkFlowy

My go-to app for meeting notes, [WorkFlowy](#) is a simple concept that is surprisingly difficult to explain. Every line you write in WorkFlowy is both a list item and a heading for subtasks. When you write a line, you can click the bullet point next to it to zoom in, and add sub-items. It's best to explain with a video:



Pros:

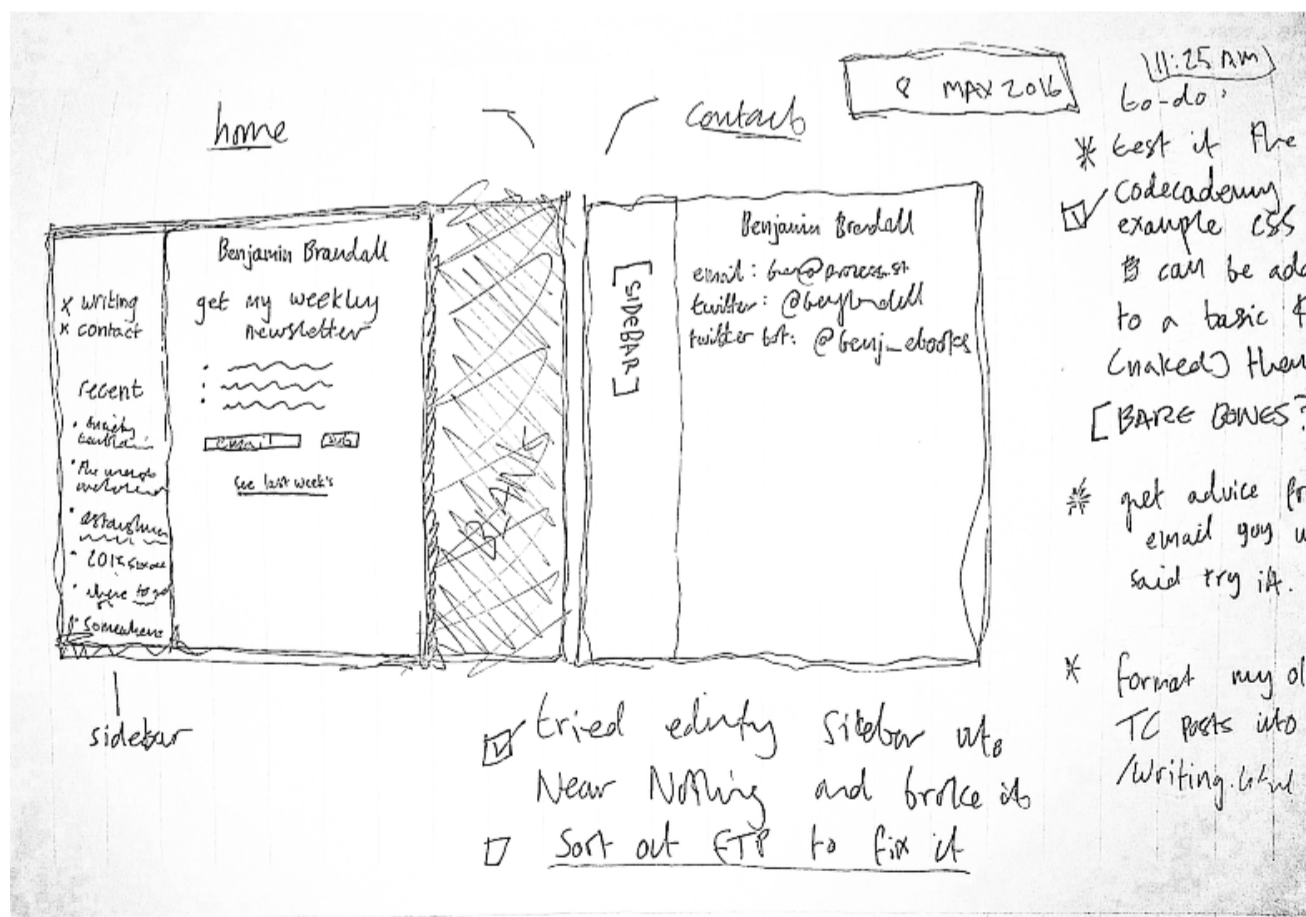
- Intuitive and quick to use
- Makes great use of keyboard shortcuts
- Everything you ever write can be seen on one page (without it getting cluttered)

Cons:

- WorkFlowy doesn't integrate with anything, making it **a bit awkward** to add tasks from anywhere other than the app.

Pen & Paper

Not an app. Good old pen and paper! When I need to accompany my notes with a sketch, I like to use my notebook. For example, on Sunday morning I drew out the basic format for a website I want to make, and then wrote the to-do list next to it.



The good thing about writing with pen and paper is that both Evernote and OneNote support search inside the handwriting! See [here](#) for Evernote's announcement (a premium feature) and here for a demonstration of OneNote searching a scanned document.

Go get planning

This should be everything you need to get tasks out of your head and into neatly categorized subtasks. That way, you'll know exactly what you need to do.

03.

How to Make a To-Do List to Power up Your Productivity



How to Make a To-Do List to Power up Your Productivity

In the last [chapter](#), I showed you how to get tasks out of your head and into your notebook.

In this post I'm going to answer some questions you might be having about what to do next, and show you how to make a to-do list even when you're short on time.

- Where do I put my tasks?
- How do I break them down?
- How do I word them?
- What resources do I need to keep alongside them?

Read on to find out the answers.

Where should you put your tasks?

Do you already use a task management app? Are you totally happy with it? In a recent post, I walk you through the pros and cons of 13 different checklist apps, so go and check that out now if you're undecided.

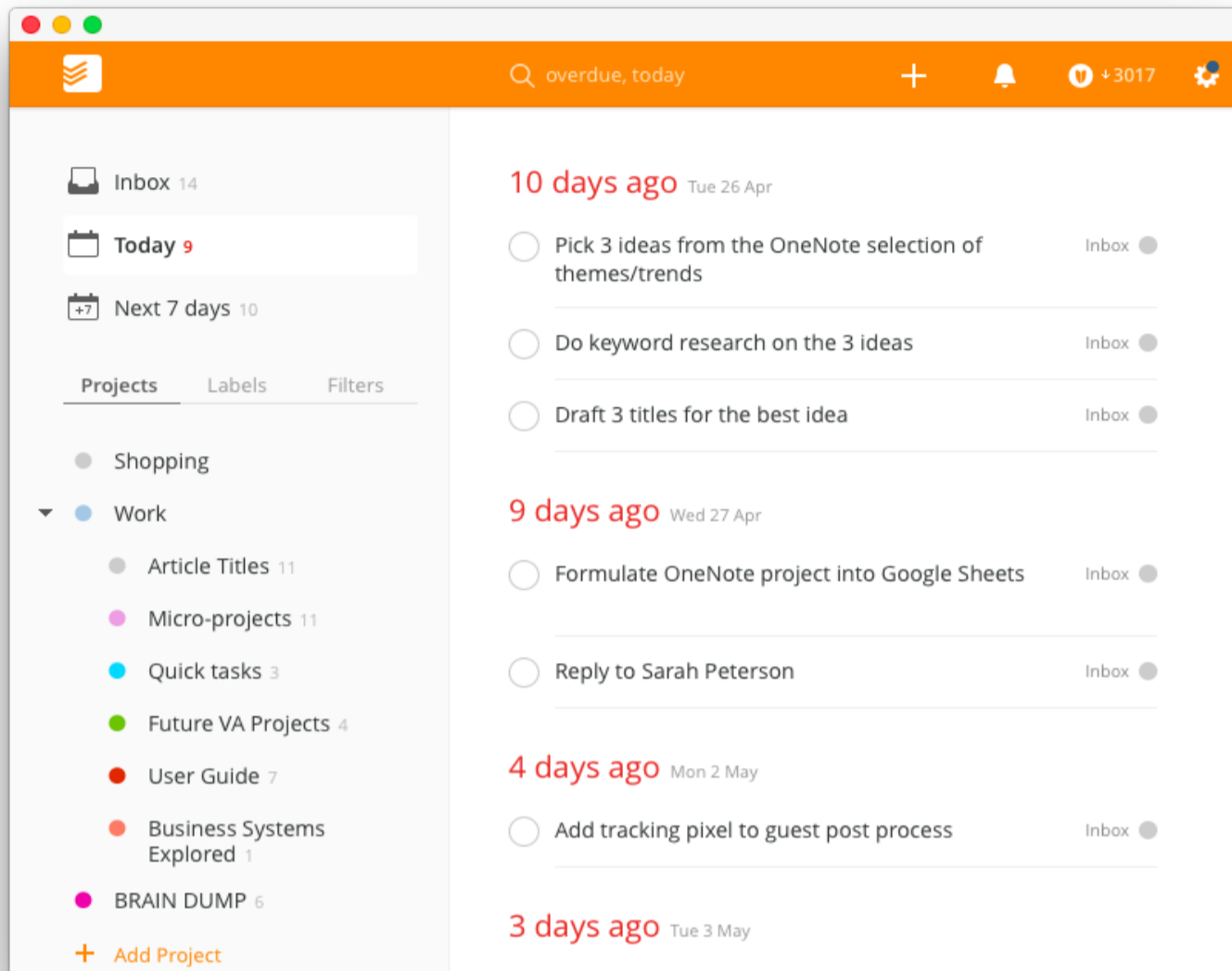
Selecting a task management app is mostly a matter of **personal taste** and **use case**. Some tools are better suited for Getting Things Done. Some are Kanban tools suited for [Agile](#), and others are extremely simple – great for personal tasks where you keep the information and resources separately. Here are some quick recommendations:

The best task management tools for Getting Things Done

As I've already explained in [the first part of this guide](#), Getting Things Done is a methodology for task management. The basic idea is that you get all of the tasks out of your head, formulate them into action items, then ruthlessly clear them out. A task management tool for Getting Things Done needs:

- Projects with tasks / sub-tasks
- Prioritization
- Preferably: search, filters, tags.

The tool which fits this description is [Todoist](#).

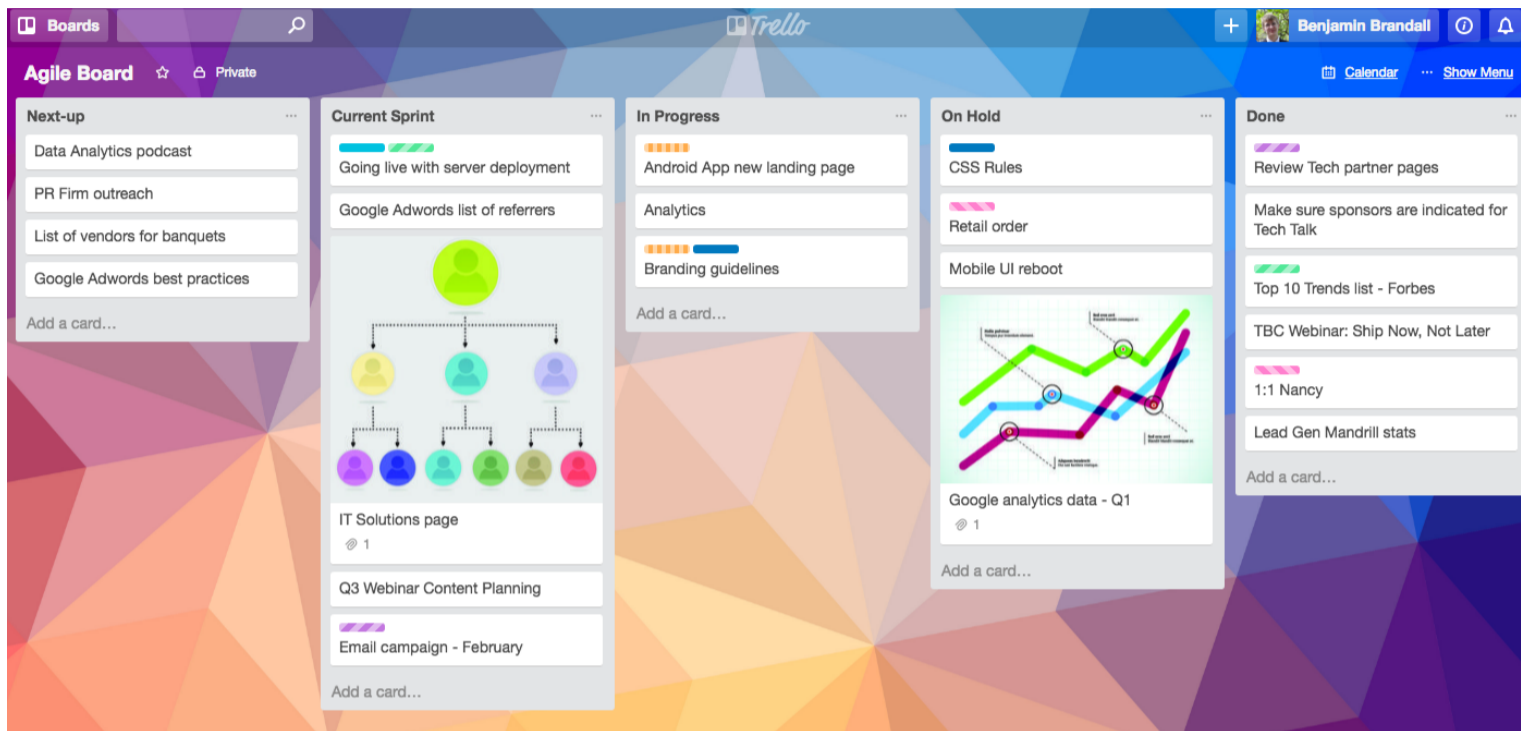


Todoist was built around GTD, making it an ideal choice. You can create projects with tasks and subtasks, set priorities and create saved searches. It's available on every platform you can imagine, so it's easy to add tasks that sync across the board. Other solid (yet more platform-limited) choices include [Things](#) and [Omnifocus](#).

The best task management tools for Kanban / Agile

For action items you can't knock off in a single sweep (ones that might

require approval, collaboration or external resources), it's best to track their progress in a Kanban board with lists that show the status of a task as it goes through the [process](#), like this:

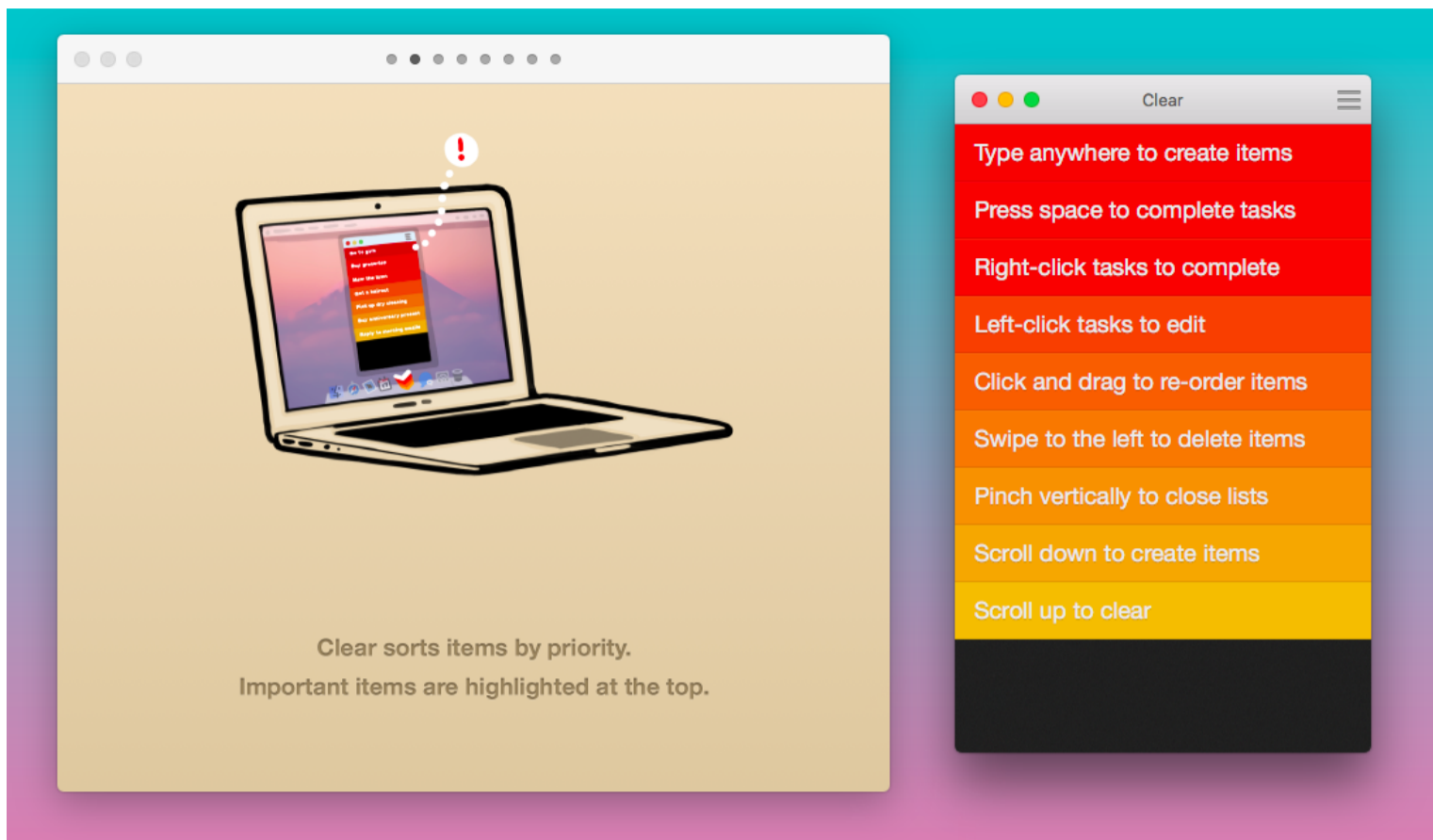


In case I didn't already ruin the surprise, I'm nominating [Trello](#) as the best Kanban tool, and the best way to get started with Agile methodology. Other Kanban tools include Kanbanchi, and [KanbanFlow](#).

The simplest task management tools

Sometimes you don't need anything more than a couple of lists and a way to organize the tasks inside them. Lately, I've settled with quickly adding tasks from my paper notebook to a simple task manager, and tracking my larger projects and group tasks on [project management](#) software Trello.

For simple task management, I'd recommend [Clear](#).



You can't get much simpler than that. The downside is that you can only get it on OS X or iOS. For Android, I'd recommend [Any.Do](#) (but don't bother with the grotesque web version) and for Windows/web try [TickTick](#). If you want your tasks to live inside your terminal, check out [todo.txt!](#)

How to break your tasks down into manageable chunks

After getting tasks out of your head and written down somewhere, you'll probably be left with some items that aren't really tasks, but projects in disguise. If you look through and realize, "I can't do this in

one action”, then it’s a project and you need to break it down into things you *can* do in one action.

Some projects are small (like organizing your wardrobe), but some will be massive and could take months; a website redesign, for example.

For big projects, you’ll want to open up a new section in your to-do list app, or a new Kanban board. Start adding everything you know you need to accomplish, then adding subtasks breaking that down. For example:

- *Main task (card or task)* – Redesign website header image
- *Subtasks* – Brainstorm 10 different concepts; Write a design brief; sign up for 99designs; pick the best option; etc., etc...

For every item, ask yourself: what’s the next action? If there is one, add it as a sub-task.

However, to keep your tasks actionable and the project moving forward, you’ll need to make sure you’re naming your tasks properly.

How to name your action items properly

The way you write your to-do list can affect your productivity massively. The effects range from a logical issue (such as, ‘this task isn’t named descriptively enough for me to action it’) to a psychological barrier getting in the way of your productivity.

Verb the noun with the object

Since tasks are there for you to take action on, you want them to be *actionable*. As in, lead you from start to finish in one go.

When I first started managing my tasks, I was terrible at it. My list was full of rubbish like ‘think about X’ or ‘start on Y’. It doesn’t make any sense, and I can’t act on it. [Merlin Mann](#) of the fantastic [43Folders](#) says that the best to-do list items fit this description:

- it’s a physical action
- it can be accomplished at a sitting
- it supports valuable progress toward a recognized goal
- it’s something for which you are the most appropriate person for the job

And a guideline for writing the item itself in your list is: “verb the noun with the object”

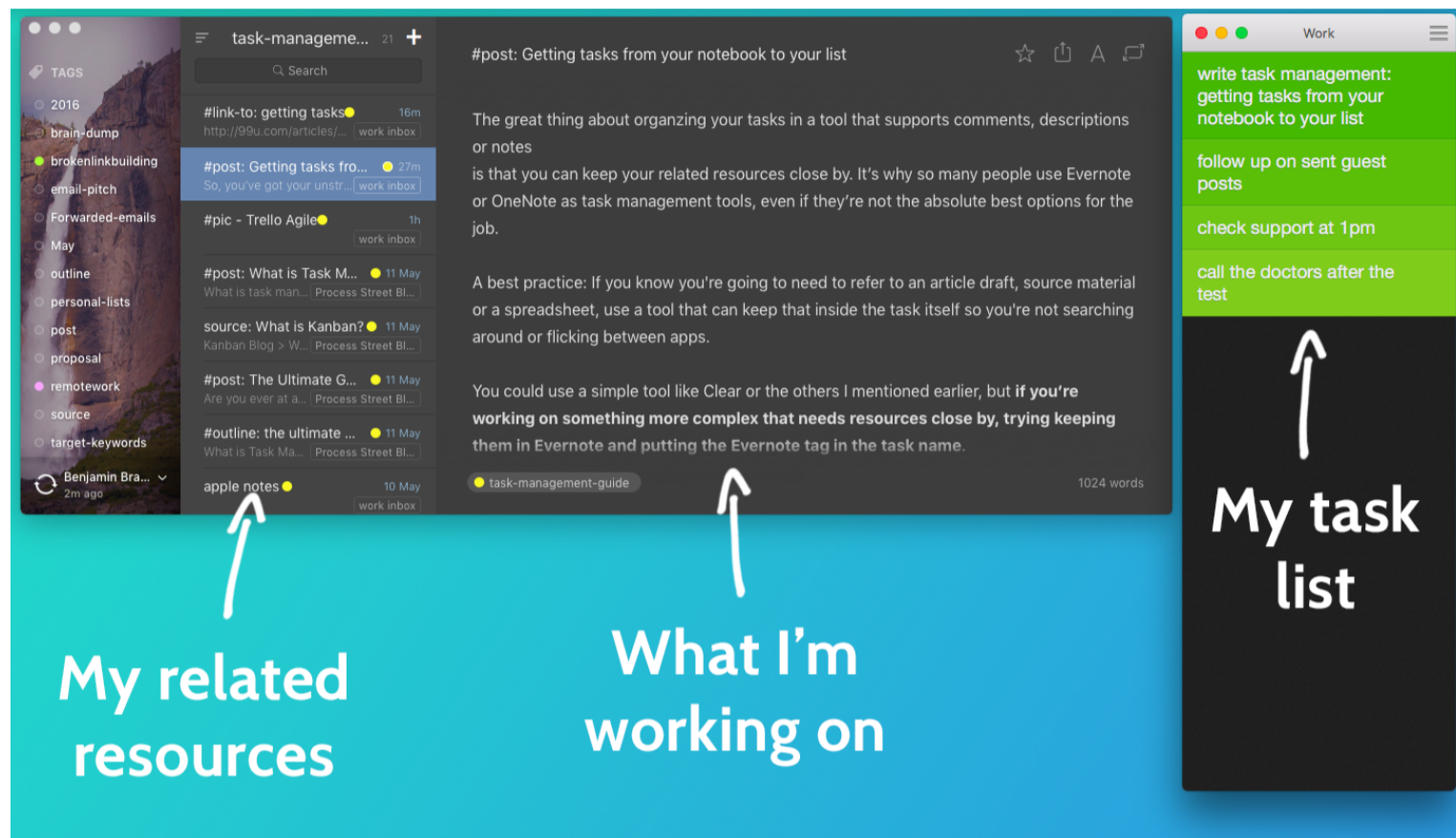
example: “*review the Q3 budget with Jim*”

Keep your task resources close by

The great thing about organizing your tasks in a tool that supports comments, descriptions or notes is that you can keep your related resources close by. It’s why so many people use Evernote or OneNote as task management tools, even if they’re not the absolute best options for the job.

A best practice: If you know you’re going to need to refer to an article draft, source material or a spreadsheet, use a tool that can keep that

inside the task itself so you're not searching around or flicking between apps.



You could use a simple tool like Clear or the others I mentioned earlier, but if you're working on something more complex that needs resources close by, trying keeping them in Evernote and putting the Evernote tag in the task name.

04. How to Prioritize Tasks



How to Prioritize Tasks

and Do Only The Work That Matters

You've got a ton of work to do right now.

Your to-do list is an unstructured mess of action items, and you've only got a faint idea how to prioritize tasks.

Luckily, there are a few (almost automatic) ways to quickly get your to-do list prioritized without much effort. In fact, you can apply one of these methods within 5 minutes and know exactly what to do next. There have been a number of methods over the years, and all have their own quirks and considerations.

Which is right for you?

In previous chapters of my [task management guide](#), I've taken you all the way through from writing, organizing and planning your to-do list. Go and check out those if you haven't already.

Now, let's look at 4 different ways to prioritize your tasks.

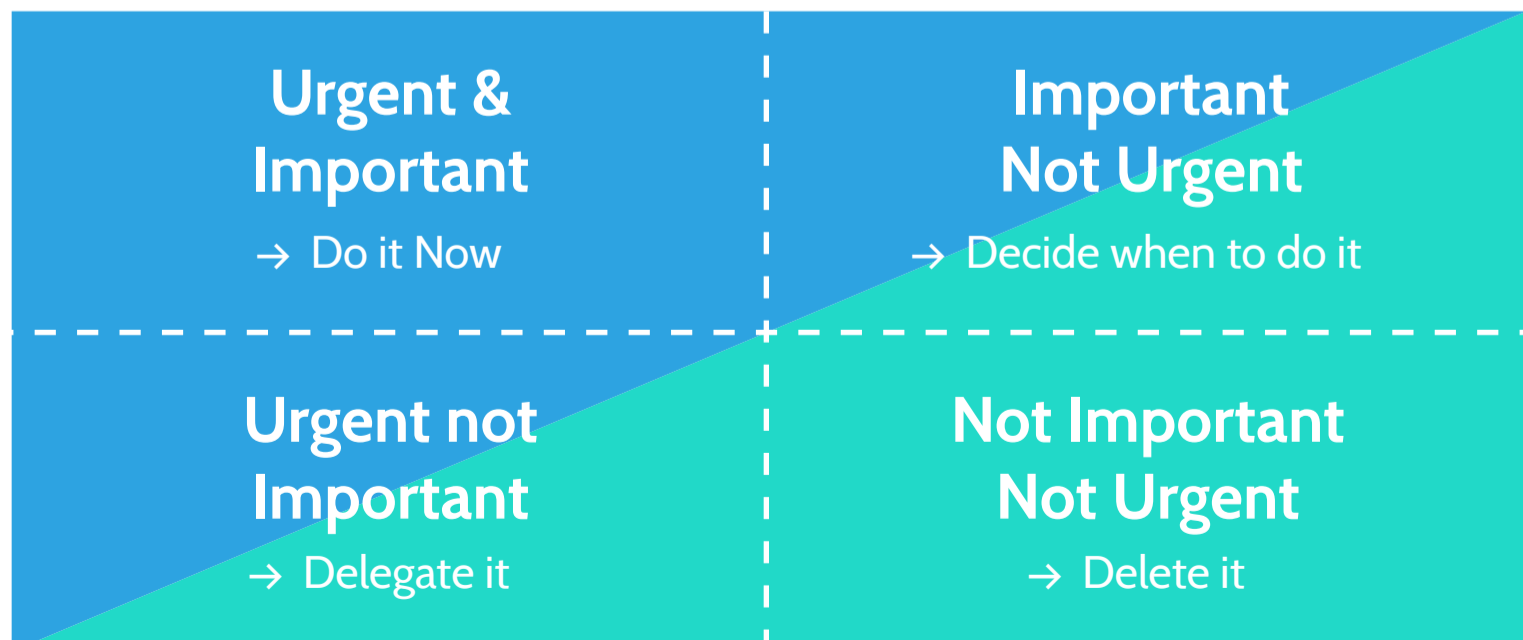
Slot your tasks into 4 boxes – Urgent vs Important

Here's a task prioritization method from former U.S. President Dwight D. Eisenhower.

In 1954, he said:

“ I have two kinds of problems: the urgent and the important. The urgent are not important, and the important are never urgent.” – Eisenhower

It was this quote that created the **Eisenhower Matrix**; a 4-box system for organizing your tasks by urgency and importance, then getting them done.



The Eisenhower Matrix puts tasks into 2 categories, then prioritizes them for you. It's a fast way to get everything in order at the start of the day.

Action: Get into the habit of quickly categorizing tasks by using this checklist on your to-do list:

The 'Important' Checklist:

- It will effect many people or projects if incomplete
- Other tasks depend on its completion
- It contributes a lot of value
- It's low effort-high results (80/20 principle)

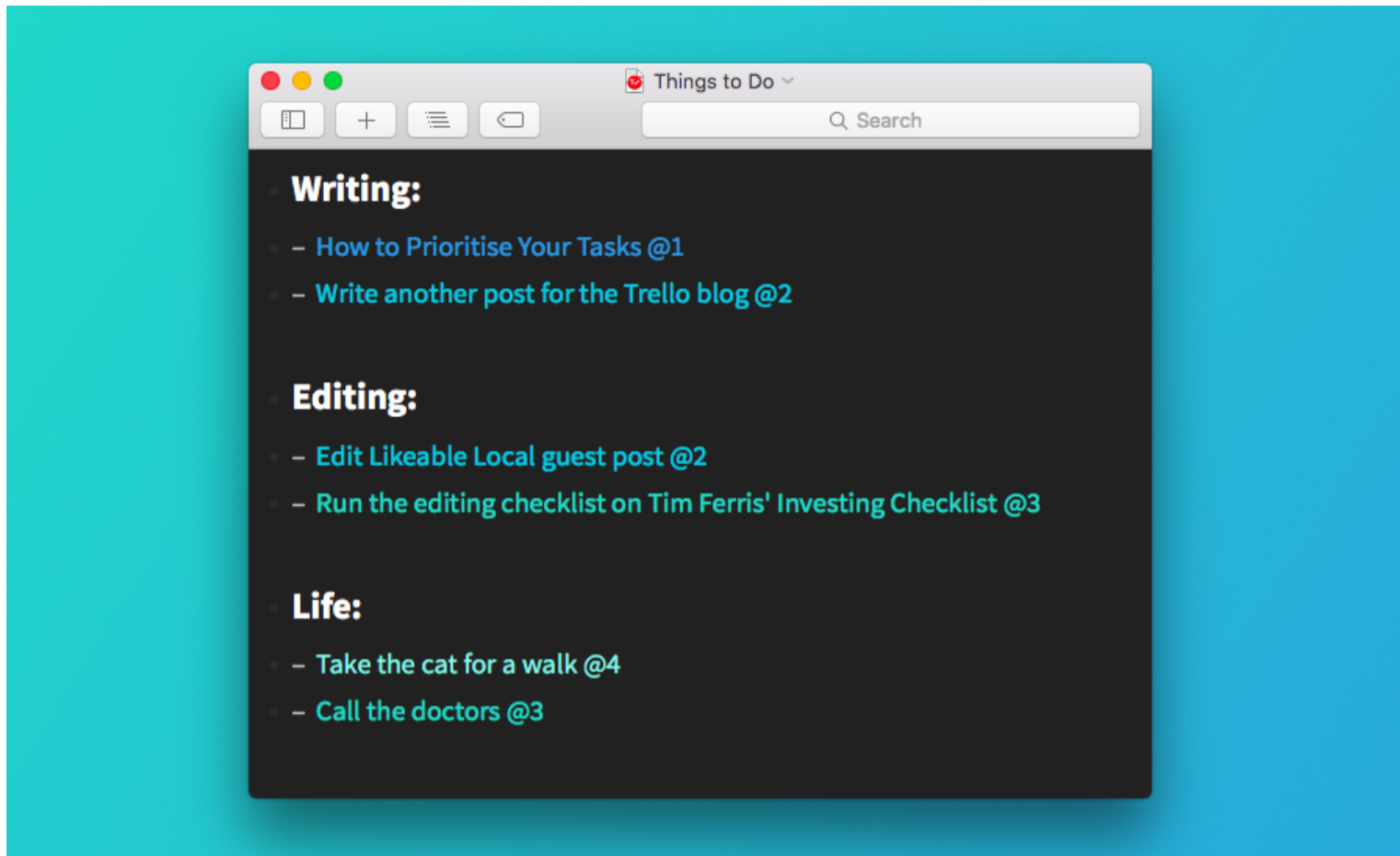
The 'Urgent' Checklist:

- It is overdue
- It is due soon
- It demands immediate attention
- The consequences of not doing it are immediate

To apply the matrix to your to-do list, use tags to denote which quadrant of the matrix it falls into. From top right to left, you've got:

1. Urgent AND important
2. Important NOT urgent
3. Urgent NOT important
4. NOT urgent OR important

When I check this against my semi-fictional task list in TaskPaper, it's easy to see what's a priority and what isn't:



The Eisenhower Matrix saves the day.

When you have two frogs to eat, eat the ugliest one first

In slight contrast to the Eisenhower Matrix, Brian Tracy's method of consuming amphibians focuses on your *feelings* towards the tasks on your list.

In the words of Mark Twain, if you eat a live frog each day for breakfast, nothing worse can happen for the rest of the day. And so, the idea is to eat the worst frog as early as possible then breeze through the day. Replacing frogs with tasks, how does this method work?

You categorize tasks into 4 boxes, of course.

1. Things you don't want to do, and actually don't need to do.
2. Things you don't want to do, but actually need to do.
3. Things you want to do and actually need to do.
4. Things you want to do, but actually don't need to do.

The logic is, that if you don't want to do a task, it's probably because it's hard. You know it's important but you're procrastinating. **Get the biggest, ugliest task out of the way as soon as you can, and the rest will come easily.**



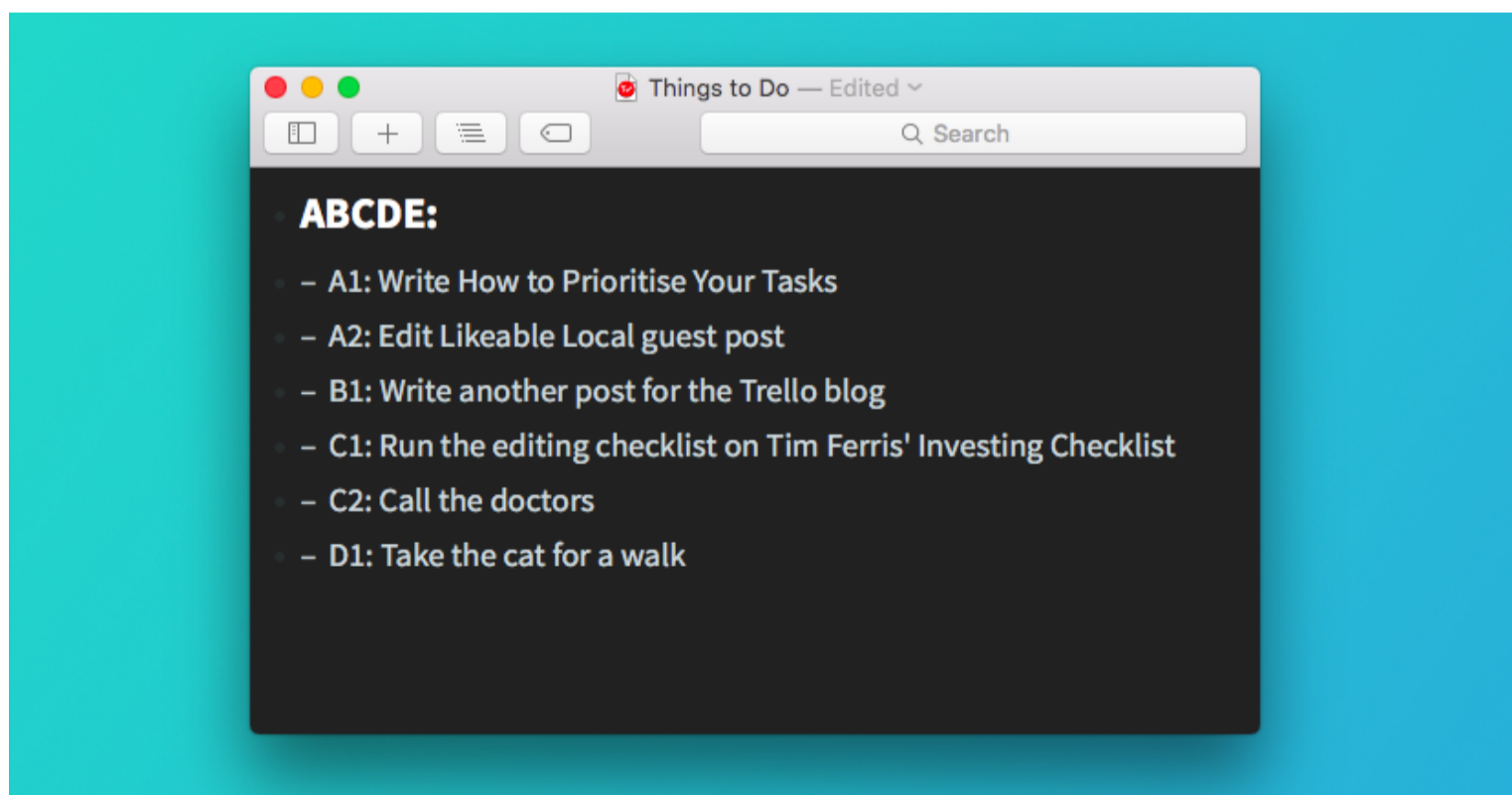
You can use the same tagging method of 1, 2, 3, 4 like I demonstrated above, or you can apply this methodology to one of the 7 task management lists I've previously outlined.

Use the ABCDE method for precise prioritization

Another prioritization method here from Brian Tracy, this time a little more mathematical. I love how it takes into account that **different tasks can take the same priority level**. Instead of randomly doing equal-priority tasks as they come along, the ABCDE method has two levels of priority. Here's the steps to take to prioritize your tasks with this method:

1. Going through your list, give every task a letter from A to E, A being the highest priority
2. For every task that has an A, give it a number which dictates the order you'll do it in
3. Repeat until all tasks have letters and numbers

So, for example:



To make sure there's point in categorizing them so strictly, you're going to have to be hard on yourself.

You're not allowed to start on a new letter until the previous letter is fully complete.

If you reference this against the other two methods I've outlined already, your A tasks would be your ... urgent and important frogs.

The simplest method: pick your 1-3 most important tasks

True to form, the simplest way to prioritize your tasks comes from Zen Habits. In the book *Zen to Done*, Leo Babauta says:

“ At the beginning of each day, review your list, and write down 1-3 MITs [most important tasks] that you'd like to accomplish for the day. That's your whole planning system. You don't need any more than that.. ” –
Zen to Done

Using the other methods in this article, you should be well equipped to pick your 1-3 MITs quickly, and get on the path to hitting to-do list zero.

The beauty of this method, however, is that it relies on your intuition. After you've been on a few projects, or swamped by an overpowering to-do list enough times, you instinctively know which tasks are your most important.

In the end, there's not a complete mathematical formula for working it out, but there are some ways to make prioritizing your tasks a habit, and a skill you can hone to get work done faster.

05. Plan Your Next Week in One Hour



Weekly Review Checklist

14 Steps to Your Most Productive Week Ever

It's easy to wake up, check the tasks marked for today and get stuck in with your most urgent and important duty. What's harder is taking a big picture look at your task list. Who can be bothered with that? Surely that's an hour you'll never get back?

Nope!

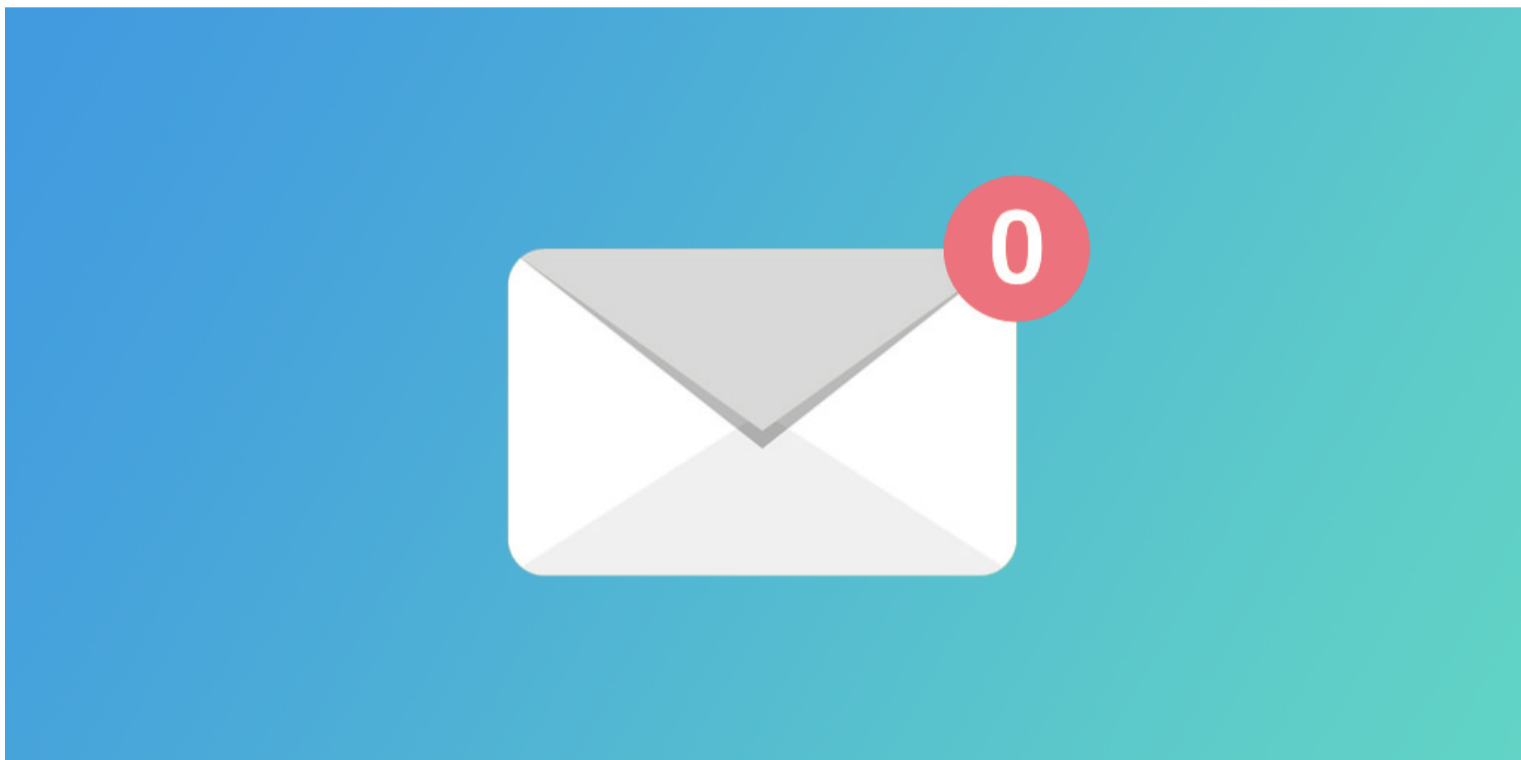
You've got a bunch of tasks marked for later, or pending someone else's actions. So, when's 'someday'? What's waiting the next action?

You can be so focused on putting out fires and [setting priorities](#) that you leave half of your tasks sitting somewhere out of sight, which is the sort of behavior that stops you from hitting your goals and finally getting round to the work that matters.

With a little help from GTD, and inspiration from a number of task management systems, I've put together a quick, actionable guide on carrying out a weekly review on your productivity. Do this every week, and you're sure to stay on top of your game.

Reset your life to zero

Do a reset on your life by **processing all your inboxes**. This means you can start the next week fresh, and not have any tasks hanging over that could be processed and actioned.



Email inbox: You don't want to be going through a thick wad of emails first thing Monday. Get your emails down to zero by **processing any action items into your inbox**, replying to anything that needs a response, and archiving everything that doesn't need action (or has already been added to your to-do list or replied to). The best app for lightning-fast inbox processing is Inbox by Gmail, which you can read more about in [my total guide to email productivity](#).

Evernote inbox: If you've set Evernote up properly, you should have an inbox set up as the default location for all new notes. If you're anything

like me, it'll be a bunch of Untitled Quick Notes without tags. **Tag them, title them, move them to the right notebook.**

To-do list inbox: Every to-do list has two overarching sections: an inbox, and a section for processed items, with priority and tags. Get everything from your inbox into the 2nd section by moving it into the right project, prioritizing it and tagging it properly.

A quick note on inbox processing: depending on your line of work, your inbox could be in a few different places. Anywhere you fill with unstructured content over the course of the week is an inbox. For me, that's [Pocket](#), [Evernote](#) and [Inbox by Gmail](#).

If you have one, **bring up your weekly goal list.** It's too much to go over in this quick-start guide, but I'd highly suggest reading [this blog post on the topic](#).

Next, **bring up your done list.** Depending on what kind of checklist app you use, there'll be different ways to do this. I use [TaskPaper](#), and that pushes all tasks marked @done to a new category at the bottom of the page called 'Archive'. You can get the same effect on [Wunderlist](#) or [Todoist](#) by tapping 'Show completed tasks', for example.

Finally for this bit, you need to **collect your loose papers, items from various apps and general miscellaneous material.** Process them into your to-do list, or archive them if they're not actionable. For me, the only applicable content left over here is from my paper notebook that I capture ideas and to-do list items in while I'm waiting.

Update your lists



After processing from your various sources into your inbox, **make sure you've got everything you've already done checked off.** Mark anything 'waiting' if you're waiting on someone else's action, and write next actions for bigger inbox tasks before processing them into the correct project.

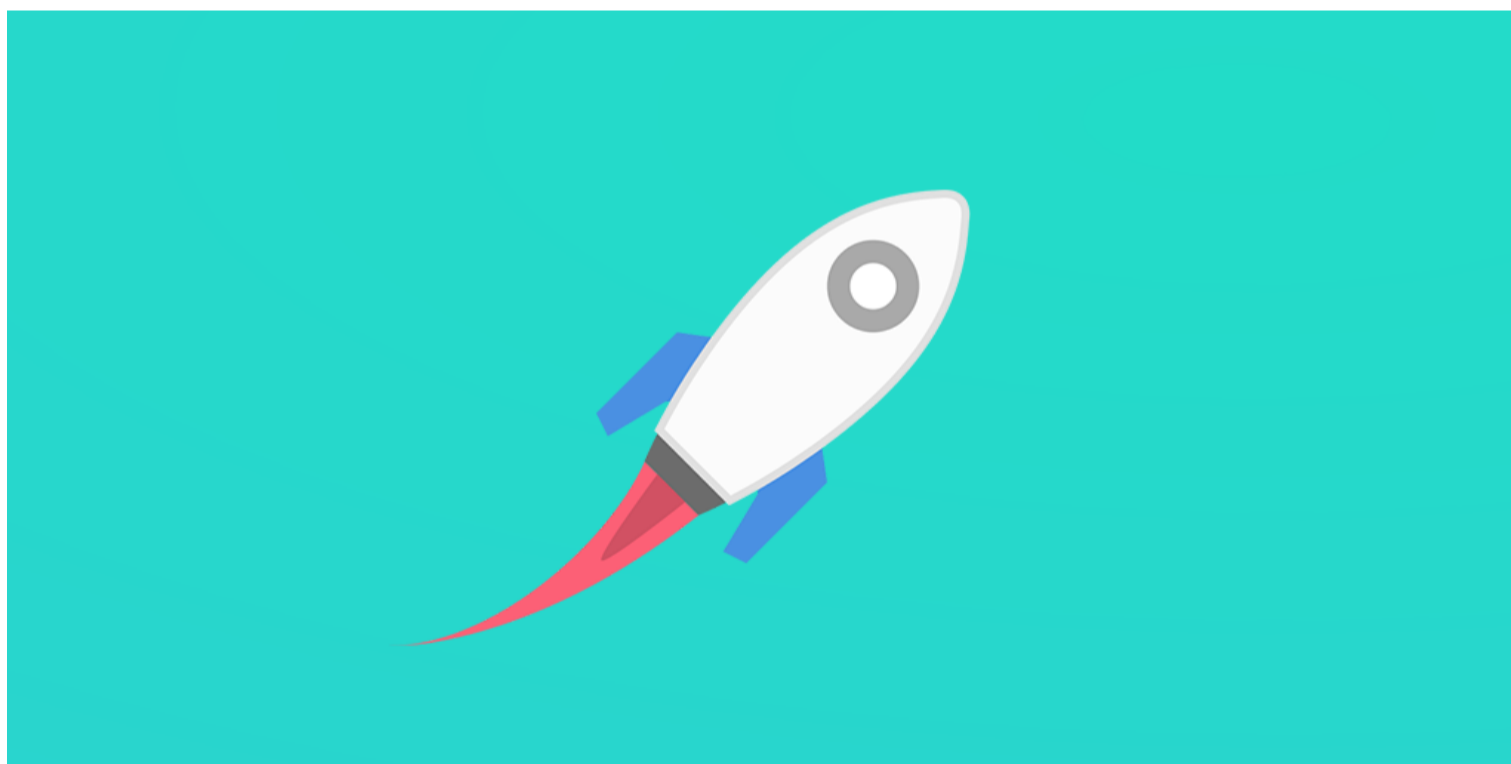
Next, **process your upcoming tasks.** Check your calendar, and see if anything you've got upcoming for the next month needs next actions. Process these into your to-do list and make sure the calendar event times are still correct.

It's time to **follow up and find out the status on tasks you're waiting for other people's actions on.** Pester them if you have to. It's a terrible feeling to have a to-do list full of items tagged 'waiting' and going nowhere.

Looking at your weekly goal list, now **add next actions for every goal** to make sure you're going to stay in the swing of making progress. Update these projects with any new material you've gathered in the previous week and get everything linked together.

Check back through and **make sure you've actually completed the necessary steps in your weekly process checklists and done list**. Let's face it, the further away these get, the less likely you are to go back and address and pending issues, so get it over and done with now.

Look to the future



It's so easy to mark a task as 'someday', but what happens when you have to go and prioritize it? In my case, 'someday' can be as good as 'never'. Snap yourself out of it and **give your 'someday' tasks a priority**, however low it might be.

A week of hard work can mean you had too much to do for a good old capture session (also known charmingly as a brain dump). Take this chance to capture new ideas, projects, risks, and schemes to your inbox!

Now you've gone through a weekly review, and worked with your own systems for the past hour or so, you've got to ask yourself an important question: was this process optimized?

If the inbox processing stage took you forever, it could be because you're storing material in too many different apps. A quick solution is to zap all incoming content to one place using any number of different [Zapier integrations](#).

Are you taking too long getting items from your paper notebook to your digital one? How about using Evernote's [scanner app](#) or OneNote's amazing [image-to-text feature](#) to quickly rip handwriting into your computer.

The best way to get it done: a weekly review checklist

In true Process Street style, I've put together a checklist for you to run through to make sure you've hit every touchpoint and left nothing hanging over 'til next week.

Pro Tip: Use Process Street to assign it to yourself every week and get on track

Share ▾ Let me use this checklist for my business... Give me this checklist!

Task Management: Weekly Review Checklist

Run this review checklist every week to get your tasks in order, and start afresh next week.

1	Process your inboxes:	
2	<input type="checkbox"/> Email inbox	➤
3	<input type="checkbox"/> Evernote inbox	➤
4	<input type="checkbox"/> To-do list inbox	➤
5	Gather materials:	
6	<input type="checkbox"/> Weekly goal list	➤
7	<input type="checkbox"/> Done list	➤
8	<input type="checkbox"/> Loose papers, miscellaneous material	➤
9	Update your lists:	

➤

This brings me to the end of my task management guide!

If you've missed the previous parts, or want a refresher, go ahead and check them out:

- [What is Task Management? 3 Proven Methods Explained](#)
- [How to Make a To-Do List to Power up Your Productivity](#)
- [Task Planning: Getting Tasks Out of Your Head & Into Your Notebook](#)
- [How to Prioritize Tasks and Do Only The Work That Matters](#)

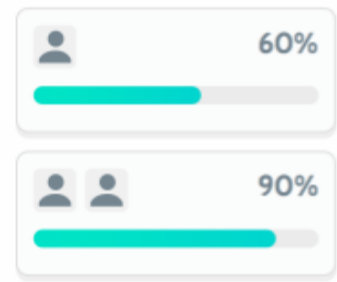
The simplest way to manage recurring workflows for your team.



Create process template



Run multiple instances of the template as checklists



Track progress and collaborate with your team

Here's how it helps you improve.

Create procedure documents in seconds

Run processes as collaborative workflows

Integrate with over 500+ apps to automate tasks

**Get More Done:
The Complete Introduction to
Task Management**