

ToDoMatrix Best Practices Briefing

ToDoMatrix 2007.09.01.4x and Subsequent Releases

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Special Note:

With this release, ToDoMatrix has evolved to a point where we feel compelled to write a paper sharing our thoughts as to the best way to use the system.

With the introduction of seven dimensions (four of which are completely reconfigurable) and nearly unlimited filtering capabilities, the way a professional uses ToDoMatrix can vary greatly.

We really hope that you take the time to read this paper and understand the possibilities. Most people today never read documentation – but we are absolutely convinced that if you do invest the time, your ToDoMatrix experience will be far more rewarding and it will ultimately

- *reduce stress,*
- *improve your focus,*
- *make your tasks easier to manage,*
- *save hours each week, and*
- *get more of the best things done.*

Thanks,

The REXwireless Team

ToDoMatrix Best Practices Briefing

ToDoMatrix 2007.09.01.4x and Subsequent Releases

1.0 The Evolution of ToDoMatrix Professional

REXwireless Software created ToDoMatrix to be a highly-flexible task manager for BlackBerry® smartphones. The base BlackBerry platform does not contain a relational database. To foster flexibility, we first developed our own relational database engine for the BlackBerry, designing it to be memory and battery efficient, and then finished our user interface application.

This resulted in an application that can be configured to be as simple or as capable as the user wants. As ToDoMatrix evolved, we continued to add features at both ends of the spectrum. As we added capabilities, we made most advances optional and configurable in user profile preferences. With this seven dimensional release, we have maintained this configurable formula for people that want to use ToDoMatrix in a simplified fashion.

From the beginning, REXwireless believed that "wireless, mobile, and always-with-you" are near magical ingredients for task management. Contrary to widespread PC-centric thinking, task management is not a natural fit for PC's or Macs. Full-sized computers are not always present when you want to jot down that quick thought. Too often, inspiration happens when you are at dinner with the family or right before falling asleep, not when you are sitting at your desk.

While ToDoMatrix has evolved into a highly-capable system, please do not be deterred if you want to use it in a simple fashion. It can be configured to be simple and grow with you as your needs require.

The BlackBerry smartphone was a natural choice for our project. No other platform, the new iPhone included, offers a more efficient mobile device for getting a lot of things done. The BlackBerry offers state-of-the-art capability and stability, with push communications and battery life second to none.

Most mobile applications are either too thin on functionality or too complex to use on the small screen. ToDoMatrix solved that Rubik's Cube puzzle, balancing F-18-like capabilities while making it straightforward to use in a small number of pixels. It can handle the complex life of a professional who juggles many projects and influences the workload of dozens of people, yet is simple to use for the person who wants to keep it simple. We are quite sure we found that winning combination, given the success and accolades ToDoMatrix has enjoyed.

Most people today use a task management system with fundamental flaws:

- PC / Mac task management people:
In the electronic arena, applications like Microsoft Outlook's tasks component fall short on capability and availability – the PC is not always with you. The “wireless” smartphone extensions of PC programs always seem to be missing some of the PC resident versions features.
- Paper-based task management people:
Many still use paper-based planners which are bit better regarding availability but cause lots of extra work with rewrites, reschedules, and difficult search. Few people take their planners to weekend events.
- Memory-based task management people:
A great number of people try to keep it all in their head. This approach results in a lot of background stress and some forgotten items as one's subconscious reprocesses the task list many times per hour and takes focus away from the task at hand. While we have no scientific proof, we suspect a medical study would find a strong positive correlation between busy tasks-in-memory people and higher blood pressure, irritability, sleeplessness, and mental fatigue.
- PDA-based task management people:
PDA people are on the right track and have the important portability aspect. Having an application capable enough for the job is of critical importance. Unfortunately, PDA's without an integrated smartphone get left at home on weekends and evenings.

Having your trusted and capable task management application always with you, 7 x 24, is liberating and stress reducing – it becomes easy and natural to jot something down – once and for all – while on the run. Having it on a world-class communications smartphone is best.

When REXwireless started, we had no grand intentions to develop our own time management philosophy. A number of high-profile authors, lecturers, and personal coaches vie for the thought-leadership crown in the space. REXwireless simply wanted to harness the magic power of “wireless and mobile” for capable tasks management with tracking delegated items.

As ToDoMatrix evolved, it became obvious that two schools of thought needed to be integrated into the original ToDoMatrix formula:

- 1) World-class daily process and workflow.
- 2) World-class ways to look at the same data from a strategic goals perspective.

Based on the feedback from our customers, the two thought-leaders on these topics are:

- 1) David Allen for superior process / flow (see his book *Getting Things Done*) and
- 2) Stephen Covey for strategic planning / life balancing (see his books *Seven Habits of Highly Effective People* and *First Things First*).

Most striking to us was that customers that wrote us were either in one camp or the other. Yet, when we looked to support the best of GTD and Seven Habits / First Things First, we realized that the concepts are not mutually exclusive and in fact complement each other. With this release, ToDoMatrix combines GTD, Covey, and BlackBerry wireless in such a way that the combination and results are extraordinarily powerful and greater than the sum of the parts.

2.0 In Our Opinion, Both David Allen and Stephen Covey are Right

Even though David and Stephen compete against each other for selling books and lectures, both gentlemen are right.

Mr. Allen is correct that developing a habit of superior task management process is critical. As life accelerates and we juggle more things simultaneously, people with poor process get overwhelmed, frustrated, stressed, and far less productive.

Mr. Covey is correct that keeping one's life in balance and working on the most important strategic tasks is crucial. As life accelerates, seeing the big picture becomes exponentially more difficult.

If you are reading this white paper and have not read David Allen and Stephen Covey's books, we would recommend purchasing and reading both over the coming month to gain greater understanding. In our opinion, buying the audio books is the best move – the discussion on audio, especially on the GTD topic, is abridged and more easily understood in a short amount of time. If you have to commute to work, finding the time for the audio book is easy enough without taking more time out of your day.

While not as effective as the original material, you could use your favorite search engine to look for summaries of both David's and Stephen's books.

3.0 David Allen and *Getting Things Done* in a Nutshell

In *Getting Things Done*, David Allen observes that as our knowledge-based, real-time world has accelerated, traditional task management has failed to keep up. He argues that instituting excellent personal processes for managing an ever-growing workload is a must.

Eight key aspects of the GTD process and methodology are:

3A) Decisions should be made on every input item, large or small, when it first comes in.

Every input (mail inbox, email inbox, voicemail, conversations, one's own ideas and initiatives) that might result in a task or project must follow one of five paths:

- A1) act and finish the item immediately,
- A2) trash the item if action is not needed,
- A3) file the item for future reference in a well-organized filing system,
- A4) add the task to a trusted task management system for future action, with enough details, and planning to make the task truly actionable without more thought when the trigger time arrives, or
- A5) add the task and then delegate it to someone else.

Best practices process never leaves input items in generic baskets, buckets, or piles to be reprocessed again, wasting valuable time and brain cycles. While many people initially have difficulty with this idea, practitioners of GTD all report that following the process faithfully results in less work, less stress, and more productive use of time over the long run.

3B) Tasks must be discrete and actionable.

Tasks must always be broken down to small, truly actionable and clearly defined steps within a project folder. When written tasks represent one discrete step, they can be then be instantly acted on without having to think through what other steps lie hidden in the note. If there are additional steps, than the task is really too broad or is a small project, which should be broken into smaller tasks.

3C) Don't create overhead by tracking tiny tasks: do them immediately.

If a task will take you less than two minutes to complete, do it immediately. Do not put it in your task management system because "managing" a task and pulling out the supporting information to get a task done takes more than two minutes of overhead.

3D) Think tasks through when putting them into the task system.

When you decide that a task will be deferred until later and therefore entered in your trusted task management system, certain decisions must be made when the task is added, such as due date, status, priority, context (where a

task can be performed) and which task is truly “the next action” in a project folder.

Ben Franklin coined the famous phrase “An ounce of prevention is worth a pound of cure”. A little bit of task pre-planning at the time of task inception is far smarter in terms of process, workflow, and productivity than ever reprocessing a vague task list and making decisions about tasks later.

3E) Pick THE next action on each project.

Within each project (projects all have their own folder), pick the single “next action” to be done on the project. When you complete that next action, decide what the subsequent “next action” is and decide when you will do that next action.

3F) Schedule it.

Use dates and ticklers in a system you trust to bring tasks back into the forefront focus when you decide they should be addressed.

3G) Don't look at or think about the tasks that are not relevant in the here and now.

During the workday, decide what you will do next by looking only at a filtered list of next action tasks that are possible given your context, rather than the entire universe of tasks in your system. Looking at the universe hurts your focus and quality of work on the given task, while it increases unproductive stress.

3H) Review and reset often: Keep your system crisp and fresh.

The task system must be kept up-to-date. Daily review of next actions and weekly review and reset of one's overall task management system are critical to sustained productivity.

There are greater nuances to the GTD system (the paperback is 259 pages after all). If you are new to GTD, listen to the Getting Things Done audio program to refine your process.

4.0 Stephen Covey, *Seven Habits* and *First Things First* in a Nutshell

Stephen Covey's big ideas were first outlined in his best seller *Seven Habits of Highly Effective People*, specifically in Habit Three. Mr. Covey then examined time and life management in greater detail in his follow-on book *First Things First* (FTF). If you have never read *Seven Habits*, we highly recommend picking up a copy.

Key aspects of Mr. Covey's life management wisdom (FTF) include:

4A) Principles come first.

Use a principles-based approach to define purpose and vision for one's life. All people face many different situations and obstacles through the years but only a few are able to keep a steady hand through each test. Those people are the ones that have discerned their true uncompromising principles and have chosen to live by them. Principle-based people can make the right decision for themselves, at every juncture, without hesitation or regret.

4B) Define your own true north.

Once a person understands his or her principles, the next step is to define his or her vision and goals for the future. Knowing where you want to go makes all the difference in actually getting there. This step defines a person's "true north" on his or her life's compass. Mr. Covey believes all people should subordinate the clock to the compass.

4C) Plan weekly and strategically: Which tasks will make the biggest impact on your road to your true north.

All near-term project and tasks planning should start from a top down approach, where projects and tasks keep one's personal "True North" in mind. Mr. Covey points out that the ever-quickening pace of the world is preventing people from seeing and planning their time according to the "true north" that they see as strategic to their lives. He exposes the "urgency addition" many people have fallen into, where they spend most of their waking moments getting things done that are urgent and often important to other people, but not necessarily aligned with one's personal true north. Too many get addicted to urgency and crisis-mode for their personal sense of accomplishment, yet crisis-mode is never associated with strategic projects that make the quality difference in life's journey.

Mr. Covey makes a great point: "good" tasks get in the way of the "best" tasks that you could be working on, so people don't realize that they are missing the boat. Most dedicated experienced people don't work on completely "wrong" tasks. Busy professionals often work on seemingly worthy tasks for years on end, yet decades later, find out that their accomplishments have not landed them where they want to be. One of his most vivid lines from *First Things First* is "We've painstakingly climbed the 'ladder of success' rung-by-rung – the diploma, the late nights, the

promotions – only to discover as we reach the top rung that the ladder is leaning against the wrong wall.”

4D) Balance is not optional.

Balance in life is of critical importance. It is easy to fall out of balance and focus too much on one thing, often work, while you let your family, your health, or your personal relationships wither from neglect. Mr. Covey sees that most time / task management systems do little to open the user's eyes to the imbalances in their lives.

A person that has put all her energy in her work to become CEO often finds that goal tainted by the heartbreak of divorce, poor health, or spiritual neglect.

4E) Projects and tasks should be categorized by their importance and urgency to see things in a different light.

There are four types of projects / tasks. FTF ranks projects and tasks in one of four quadrants:

1. Quadrant One – Urgent and Important Projects and Tasks
2. Quadrant Two – Important but Not Urgent Projects and Tasks
3. Quadrant Three – Urgent but Not Important Projects and Tasks
4. Quadrant Four – Not Urgent and Not Important Projects and Tasks

Quadrant Two is magical. By using this simple ranking, a person often discovers that they spend little time on the Quadrant Two projects, yet those projects are invariably the ones that make all the difference in the world as to where a person ends up five, ten, twenty years into the future.

Time must be proactively budgeted for Quadrant Two items because the items that fall into Quadrant Two are strategically important items such as preparation, prevention, values clarification, planning, relationship building, and empowerment.

At the same time, many people discover that many of their tasks fall into Quadrant Three and Four. Given that there is no shortage of Important (Quadrant One, Quadrant Two) items, one must really consider which items he or she should decide drop and not complete.

4F) Achieve and monitor your balance by ranking your projects and tasks in regards to your roles in life.

Every person has multiple roles that make up their life. For example, a person might have roles as a:

- sales manager,
- husband,
- father,
- son,
- grandson,
- close friend, and
- youth ministry leader at church.

As projects and tasks are assigned, tracked, and completed, it is helpful to see that one spends 95% of their time working on the sales manager role but has not done a thing in other roles, such as son or father in weeks or months.

4G) The power to choose.

In every instant, even in the blink of an eye during a crisis moment, a person has the power to choose how he reacts and what he does next. A person can choose to keep his life in balance, he can choose to allocate time to strategic projects, and he can choose the compass over the clock.

In summary, Stephen Covey observes that time management must do more than get things done quickly and efficiently. He believes a person's time management methodology must help align a person's daily activities with their strategic goals and keep them in balance across their various roles in life. Doing more things faster is no substitute for doing the right things.

Efficiency and effectiveness are both important aspects, depending on what you are doing. Just don't try to be efficient with your spouse, kid, or the rocket science guy your company can't afford to lose. The quality of human relationships has little to do with efficiency.

5.0 ToDoMatrix Best Practices = GTD + FTF + BlackBerry "always with you" wireless.

Starting with release 2007.09.01.4x, ToDoMatrix enables a BlackBerry empowered professional to easily implement:

- Simple, straightforward task management,
- Task management with delegated task tracking,
- GTD-inspired task management and process,
- FTF-inspired task management and prioritization,
- GTD+FTF at the same time (our recommended best practice for the brave professionals that want to achieve more and are willing to change), or
- Lots of flexibility to create one's own method.

Advanced capabilities are configured in Profile / Preferences, found on the main menu, so that a person can add as much or as little of the functionality as he or she wants.

5A) Up to Seven Dimensions Available

The original ToDoMatrix design was three dimensional with project-folder, time, and delegates as the dimensions a person could use to view their tasks database. Starting with the 2007.09.01.4x release, ToDoMatrix will add four new user-configurable dimensions for a total of seven. These seven dimensions allow a person to implement the "best of Allen's GTD" and the "best of Covey's FTF" within one application, a first for the RIM BlackBerry smartphone.

The first of the user definable dimensions (4D) is preconfigured by REXwireless as "Context". Context within GTD is "where" a task is best done. Examples include @office, @car, @airport, @phone, @errands, and so forth.

As with all the new dimensions, the user can change the preconfigured contexts, or rename the dimension for another purpose if they so choose.

In order to support GTD, we have implemented a duration field within the task. As with the new dimensions, duration can be turned off and on in the user preferences found in the "Profile / Preferences" screen, found on the Folder Tree menu.

The status field has been reconfigured and now has two new status settings – "next action" and "summary". Next Action is used to signify tasks that are the next immediate action planned within a project while Summary flags a task as a summary entry within a project folder.

The next two user-definable dimensions are preconfigured for Covey's system. 5D is preconfigured as Quadrant and 6D is preconfigured as Role, but once again, the dimensions can be repurposed as a user sees fit.

The final dimension (7D) is not configured. A devotee of GTD might use it for David Allen's "Energy Required" criteria while someone that leans toward FTF might use it for a Big Picture Goals, tracking tasks that support those Goals. An attorney might use 7D as a handy way of assigning Client-Matter tracking numbers to tasks while a construction professional may opt to use the field for Job Ticket information. The possibilities are limitless.

5B) Multi-Variable Filters

David Allen's system relies in great part on the ability to view only the next actions that are immediately actionable based upon where you are physically located. Being able to simply and quickly filter your list to just those items is an important capability of ToDoMatrix.

REXwireless has added Multi-Variable Filters which are named, saved, and can be used selectively on folders, drawers, or views. A person can filter for one or more of the user-defined dimensions. For example, this will allow a person to see tasks that match criteria such as "*status of next action, priority of high or critical, context of @office, in their due this week view*". Folders remember the last filter that was used within the folder, allowing a person to stay organized with their saved filters.

Filters are accessed either via the menus while in Summary or Detail View or by using the [K] hot*key.

5C) Quick Review Wizard

A best practice with any task management system is keeping the system current and relevant. David Allen suggests that a GTD person should review both weekly and daily, keeping their tasks current. Stephen Covey feels that planning on a weekly basis helps keep the most important, most strategic items in the foreground. Covey clearly goes several steps deeper as his method asks the professional to reconnect with his or her long-term vision and goals, while checking for balance across the various roles in their life.

To help, REXwireless created the Quick Review Wizard (QRW), which speeds up daily and weekly reviews of folders, using Hot*Keys to update dates and other fields such as task status. QRW will run on any folder, drawer, or view. Even better, QRW can run against any "filtered" folder, drawer, or view.

The Quick Review Wizard is available on the menus while in Summary List View and always starts at the top of the current folder.

5D) Jump to Project Folder Navigation Option that Supports the GTD

In GTD, a person is advised to pick the "next action" on a project when the current next action on that project is completed. A new option on the Profile / Preferences screen can enable or disable the "go to containing folder on done" dialog box. When this feature is selected, a user is asked on whether they would like to go to the task's containing folder whenever they mark a task as done or deleted.

If a person does not have the option marked as active, navigation is still possible by using the [L]ast hot key to go to the completed task, and then hitting [escape] to move up to the folder level. However, if a task was deleted when completed, the last hot key will not achieve the desired result.

5E) Enhanced Drag / Drop Sorting within Special Views including Dimensions

ToDoMatrix has expanded its drag drop task capability to support folders found in the Views drawer and the folders under each dimension including Delegates. Each drag drop order is independent of each other, except for a few that focus on dates. It made sense that Due Tomorrow and Due This Week share a drag drop order, due to the related functionality.

Using drag drop in special views will not affect the drag drop order of tasks in their natural project folders.

5F) Options for Simplicity

All dimensions can be turned off and on in the Profile / Preferences screen. This allows a person that only wants to use ToDoMatrix for GTD to reduce on-screen clutter with fields that they don't plan to use. Menu options are also provided to hide view folders so that unused folders don't clutter up a person's Folder Tree view.

6.0 The Benefits of Implementing Best Practices with ToDoMatrix

Please read this section with an open mind as conventional thinking, in our opinion, understates the true benefits of tasks management excellence. The reason is that "pretty good" task management captures less than 50% of the benefits. Excellent task management, on the other hand, changes everything.

The REXwireless team believes that the benefits of best practice task management are far reaching. We believe that a person that adopts and tunes

the ToDoMatrix Way to their custom needs will in fact benefit in at least six substantive ways.

He or she will:

6A) Get more things done every day, saving hours each week.

Implementing and maintaining a best practices tasks management system in one's life is no small undertaking. It takes discipline, study, learning, and some trial and error. Many GTD professionals attest that the results can be extraordinary. Best practices, enabled by ToDoMatrix, which combines David Allen GTD process, with Stephen Covey strategic FTF focus, with the magic of always-with-you BlackBerry wireless computing, with REXwireless's capable small-screen, database-driven software is the only system capable of putting all this together in a truly usable application.

The most obvious benefit is getting more done per waking hour. Most of the best practice process comes directly from David Allen's GTD. This can lead to less hours worked each week, or more things done per week, depending on a person's goals. In our knowledge-driven real-time society, time is most precious.

6B) Get more of the right things done, the projects that matter for where a person rounds up five, ten, or twenty years down the road.

By overlaying Stephen Covey's FTF concepts, a best practices ToDoMatrix Pro gets in the habit of aligning the current workload with their personal true north. The hard part is deciding what one wants from life. Stephen Covey's concepts are easily understood and implemented into the weekly, monthly, quarterly, and annual review process. This ultimately results in getting more of the best things done each and every week. Imagine the compounding benefit over five years and how it could change your life's course.

6C) Reduce stress, improve focus and one's health, arguably our single most precious resource.

Stress reduction is perhaps the benefit that most people will see quickly. The REXwireless team believes that stress is rooted in constant worry and reprocessing of items one has in one's head. When a person follows the process, even the small items like "don't forget to pick up the milk on the way home from work" are neatly tucked in a person's ToDoMatrix with a tickler ready to remind you. When all things big and small are in the trusted system that will remind you, the mind rests. We believe that following best practices task management will help most people sleep better than that Sleep Number bed or swallowing the latest prescription Lunesta® (eszopiclone) pills, and cost far less.

6D) Improve the quality of one's work by being able to focus fully on the task at hand.

The same trusted system that reduces stress has another benefit – your mind can focus on what is directly in front of it, instead of the myriad of background semi-conscious items. Focus – David Allen's Bruce Lee inspired "mind like water" – offers extraordinary potential for improved performance.

6E) Earn more money by staying focused and on the right track.

Today's employment market's mobility is far more efficient than in any society before it. As a general rule, those that produce and accomplish more tend to move up and ultimately win positions with greater monetary rewards.

While this upward mobility takes a few years to take effect, it does happen in most cases. Imagine a sales professional that follows best practices with ToDoMatrix. She is able to cover more accounts and more prospects. She responds quickly and delights her customers. She is razor sharp, demonstrating unflinching competence. Does anyone doubt that she will outperform her peers over time and earn more money? While there are always exceptions, our employment society is now efficient enough that nine out of ten best practice task managers will earn better than their peers.

6F) Improve personal relationships with one's spouse, family, and friends.

Mr. Covey's practice of monitoring and striving for balance offers super benefits when it comes to intrapersonal relationships. Husbands pay better attention to their wives. Kids really do get quality time. The impact over ten years is fantastic. GTD alone, with its focus on efficiency, falls a bit short in regards to integrity, conscience, intrapersonal relationships, and empowerment.

In summary, the benefits of implementing best practice task management habits with ToDoMatrix are life-changing. But as Yoda would say "Do or do not... there is no try." To gain these benefits, it takes commitment, discipline, and at least 12 to 16 uncompromising weeks to build a lasting habit of task and life management excellence.

7.0 Best Practice Task Management with ToDoMatrix Professional

Best practice task management will not be for everyone. The word "best" guarantees this fact. Just as it is difficult to cut twenty strokes off your score and become a golfer with a consistent low handicap, it is difficult to raise your game in normal life as well. Those that do will reap great rewards and benefits – lower stress, more time, greater quality and accomplishment. But, like becoming a top ten percenter in any sport, career, or pursuit, becoming a top ten percenter in task-project-life management takes many good choices, lots of

practice, and unshakeable perseverance. The good news is that ToDoMatrix makes the job quite a bit easier.

7A) Getting From Point A to Point B – Phased Deliberate Approach

Everyone has some task system today, no matter if it is electronic, paper, or mental. The busier a person is, the more difficult it is to go from their current system to best practice task management instantly – after all, lots of daily tasks must still be worked on while the new process is adopted. For most, the best path is a phased plan, where conscious decisions are made and good habits incubated until they become second nature.

REXwireless recommends first learning the ToDoMatrix application, then implementing GTD, and then overlaying FTF a month or so later.

Week One: *If you are a new user, learn your way around ToDoMatrix first without changing your basic process.*

Implementing a new process is difficult if you are trying to learn new tools at the same time. ToDoMatrix can be mastered within a couple of weeks of use, as long as you use it in earnest.

We suggest watching the ToDoMatrix overview video on the website as well as printing and reading the documentation. Use ToDoMatrix for a few weeks with your current methods, just to get comfortable with the functionality on the BlackBerry and REXdesktop.com web access ends.

If you do not want to implement GTD and stick to Covey methods alone, please skip forward to the FTF phase.

Week Two: *Getting ready to GTD.*

No matter if you have read the book or not in the past, we suggest purchasing the abridged 3 hour GTD audio program and listening to David Allen before the next step. It really helps to have the goal and process in mind before going to the next phase. Even people that have read the book in the past tell us that listening to the audio gives their personal program a boost.

Week Three: *GTD full startup.*

Finding at least one or two full days to complete the startup is essential. Take the day off if you have to. Every inbox, every task, needs to be written down and put into drawers and project folders with ToDoMatrix. This includes both the work and home fronts. Most importantly, discrete next actions must be identified and documented.

At the same time, rearrange your paper filing system to be simply alphabetical. Many people make the mistake of using different filing cabinets for different “groups” such as a drawer for work and a drawer for personal, and then alpha the files within those drawers. This makes filing and retrieving a complex activity, which ultimately results in less filing and

retrieving. When one's paper filing system is purely alphabetical, filing and retrieving takes less than 10 seconds no matter the topic.

This startup must be comprehensive. If an item does not result in a task, file it or discard it. If an item results in a task, write it down in ToDoMatrix, set fields and preferably planned dates to do the task, and then file it where it belongs. If you can delegate it, do so, but track the task in ToDoMatrix. Most busy professionals knock out the startup phase in one to two full days.

Weeks Four – Seven: Getting in the GTD groove.

Grooving your golf stroke takes lots of repetition. The same is true for task management, but luckily you are on the practice tee all day long. It usually takes anywhere from 4 to 12 weeks to build the GTD habits and to become comfortable with the daily process, and the daily and weekly reviews which are essential to keeping your ToDoMatrix fresh and crisp.

John Wooden, the hall of fame basketball coach, made a great observation: If you want to play perfectly in the game, you must practice for perfection during practice. Cutting corners on some days with regards to task management best practices will dramatically decrease its value.

GTD is focused on efficiency and organization. You must ensure that this foundation is in place before moving on to the next phase.

Week Eight: Getting ready for Covey's FTF and "effectiveness".

Once you reach the point where your GTD process is running like a well-oiled Porsche, the second major step is to overlay Stephen Covey's First Things First methodology over the top of your GTD-optimized ToDoMatrix. Covey's concepts give long term strategic planning and goal setting greater life and emphasis in the system.

This is a perfect time to read *Seven Habits of Highly Effective People*. Mr. Covey has a second book "First Things First" which is a more detailed exploration, but our recommendation is to start with Seven Habits and then decide if you want to read First Things First as well.

A word of warning is that Covey's concepts, where you must discern your true north, may take far longer than a week, especially if this is the first time you have been exposed to them.

Week Nine: Overlay First Things First over your GTD ToDoMatrix

Overlaying the Covey concepts over a well maintained GTD ToDoMatrix will not take nearly as long as the initial GTD startup did. The nature of GTD is that you will already be well organized with best practices "process". What people find is that most of the time is spent thinking about where they want to end up in the long-term, and then narrowing down mid-term and long-term goals to get there.

The other common discovery after one overlays FTF is that little time is being allocated to Quadrant II Strategic (life changing) activities and that their current task load is dominated by other people's urgencies. Most people also realize that some important relationship roles in their life are currently getting shorted when it comes to balancing of time.

Week Ten – Sixteen:

Adopt Covey strategic planning to your underlying GTD base and practice using both concepts, especially in the weekly reviews. It is helpful to use ToDoMatrix's sister product, IdeaMatrix, to start keeping a weekly journal that highlights your Top 3 Strategic accomplishments for the week and Top 3 Tactical accomplishments for the week.

Journal keeping at this high level helps one see if they are really getting the right things done, not just getting a lot of things done.

7B) The Structure of ToDoMatrix

ToDoMatrix is designed around the concept that every task resides within a home "natural" folder. The folder is contained within a drawer, which is contained in the All cabinet.

We recommend reviewing the ToDoMatrix demonstration video found on our website. We have received a great amount of feedback that the ten minute overview really saves a lot of time when getting started. The web address for this page is: <http://www.rexwireless.com/individuals-tmx-video.php>

We also recommend reading the ToDoMatrix documentation if you have not been using ToDoMatrix for an extended period of time. In the time it takes to drink one Starbuck's latte, you will gain far greater understand of the application. That address is: <http://www.rexwireless.com/supportcenter-documentation.php>

When ToDoMatrix is installed on a BlackBerry, Delegation is the only advanced feature that is turned on at startup. Delegation allows a person to assign and track tasks that they have asked others to complete.

7C) ToDoMatrix Implementation Recommendations for the GTD Phase

Setting up ToDoMatrix Profile / Preferences for the GTD phase:

When you are ready to begin the initial setup for GTD, navigate to "Profile / Preferences" on the folder-view menu and activate the 4th dimension which is preconfigured as "context" as well as the Duration field, if you plan to use this option. Context is the GTD concept which is concerned with where a task is best completed (for example, @office or @home).

Mr. Allen's observation is that a person wastes valuable brain horsepower to look at a long list of tasks when deciding the next task to tackle. By deciding where a task is best performed (for example @phone), a person can filter their view to see just the tasks that meet the criteria when traffic snarls and stops on the 405.

Using folders correctly:

When setting up ToDoMatrix for best practice structure and use, we suggest using the folder as the container for a project. Folders should be quite specific and projects should be kept small and achievable in a reasonable timeframe.

Example of too broad a structure (Drawer / Folder):
Work Customers / Jetson Associates

Far better:
Jetson / MGI Sales Contract

Best practice use of task records within folders:

Tasks should be discrete and actionable items placed within the project folder (see 3B). At a minimum, we suggest setting the

- priority field,
- fourth dimension "context" field,
- due date (if possible)
- estimated duration of task

when a new task is entered into ToDoMatrix.

To aid with efficient entry of new tasks, a helpful feature of ToDoMatrix is to set one of the tasks within a folder as the "default" template for that folder. Click on "set as new task template" while your cursor is on the desired task in the summary list view to set the model task for that folder.

Following through with the folder example (*Jetson/MGI Sales Contract*), examples of discrete ready-for-immediate-next-action tasks are:

- *Call Larry Johnson at 801-555-1212 to get tractor beam wattage specification*
- *Write note to Mr. Spacely about last week's trip to the Outer Rim*
- *Reserve meeting room for the 12th at the Hyatt – should accommodate at least 16 people.*

Examples of poorly formed tasks that are too vague to be instantly actionable upon reading them are:

- *Gets specs*
- *Figure out meeting*

One of the fundamental truths of best practice task management is that tasks must be simple, clear steps, ready for action, not vague statements that require additional thinking and task breakdown before a person can proceed.

Optional summary task record within project folder:

On many projects, we suggest that a person track summary information about the project-folder. Create one task record that is not "actionable" but rather contains information such as when the overall project is due.

Example summary task in the *MGI Sales Contract* folder:

- *Summary of MGI Sales Contract – est. \$5 M services contract on tractor beam over 3 years, need to sign by Sept 1. Key decision makers include MGI’s Stan Smythe and EDS’s Gordon Black. Key recommenders are Kate Dorn and Jake Lunquist.*

This is not actionable but adds an overall due date and summary for the user to refer to, as the folder name is constrained to 40 characters. It also allows a person to close out the project when the summary task record is marked as done.

On the summary record, we suggest marking the status field as “summary” so that you can filter for just the high level summary records if you want to during a review.

If a project is active, always pick the one task that is the discrete “next action” within the project folder:

Use the status field to mark at least one task within the project as the “next action” item and give it a due date. Depending on personal preference, you may choose to set one or more alerts to trigger as well.

Additional task fields:

ToDoMatrix provides other fields such as duration, delegation, delegate due date that can be used as needed per task. Note that which fields appear is controlled in the Profile Preference screen, found via menu when on the Folder Tree menu.

Keeping track of things you have asked others to do by a certain date is especially useful.

Daily Process (Start of Day):

Start each day with a morning review. At a minimum, navigate to the following views and reschedule / edit any tasks to set them to proper dates and status, priority:

- Views / Past Due.
- Views / Today.
- Views / Next Three Days.
- Key project folders that are particularly important or timely.

Note that ToDoMatrix offers a hot*key based Quick Review Wizard that is designed to help you review and reset one folder at a time. Quick Review Wizard is found on the menu when you are in a folder or special view.

Quick Review Wizard will only act on the tasks that are shown. In most cases, it is best to turn off filtering during your review.

Daily Process (Incoming Tasks):

During the day, input any new tasks or projects as they come in. Note that ToDoMatrix offers direct injection from the BlackBerry email program, contacts, phone log application, and other input points. Injection allows a person to add tasks with minimal typing.

A key GTD process discipline is to start at the top of any input inbox and to work through the box from top to bottom without skipping anything. Remember that it is smarter to knock ultra-short-duration (less than 2 minute) tasks out immediately, even if they seem trivial, because it costs about 2 minutes of time to manage them in any tasks system. Every item needs to be decided upon when touched, not reviewed and returned to a pile for reprocessing later. Deciding means (see 3A):

- A1) act on the input immediately,
- A2) trash the item if it is not needed,
- A3) file it for future reference in a well-organized filing system,
- A4) add a task to ToDoMatrix for future action, with enough granularity, details, and planning to make the task truly actionable without more thought when the task's trigger time arrives, or
- A5) document and delegate the task if it makes sense that someone else to complete the step.

Special note: Sometimes an item that comes up is really a project that should be broken down into tasks, yet there is no time to actually think through the tasks immediately. In such cases, we recommend creating the project-folder, and then placing a task within, which schedules a tickler to "plan project and break into tasks in this folder."

Daily Process (Deciding Your Next Action):

In addition to navigating to the natural home folders of various tasks, ToDoMatrix provides special Views and Multi-Variable Filters to assist the professional with spotting their next action quickly and easily.

Hyperjump is a powerful ToDoMatrix feature. The [J]ump hot*key is far and away the easiest navigation method to hyperjump from one folder or view to another. Simply hit the [J] hot*key, type a few letters of the destination folder or view, and then scroll and click to select the desired destination.

A Context drawer and context views are provided when a person activates the 4th user dimension in Profile / Preferences. Navigate to a context (for example, @office), to view all the tasks that you have marked as best completed at the physical location you find yourself in.

The list can be narrowed down by using the Filter feature. Click on the menu and choose "filter". Then create or use a filter that only displays tasks that have a status = "Next action". A user can experiment with creating more advanced filters and adding sorting to the filtered result. A folder remembers the last filter, so that a person can easily turn the filter feature on and off, depending on their needs.

Another helpful view, next actions, is found under the Views Drawer. Please note the Views / Next Action special view. A person can filter this view for context to display similar results, offering the ability to fine tune. For example, a person might decide that the filter they normally use here matches for priority of "high" or greater, but disregards context, so that high priority next actions stay visible.

Don't forget that view folders that you don't use can be hidden from the Folder Tree menu.

Daily Process (Working Efficiently with Members of your Team):

The Delegates feature of ToDoMatrix is powerful for anyone with a large sphere of influence. By tracking all the items that have been assigned or requested of others, it becomes simple and straightforward to surprise people with your "perfect" memory. Depending on your personal situation, this feature can be used for simply tracking what associates are responsible for or hard core delegation if you are the big boss.

Whenever the ToDoMatrix user is in a meeting or on the phone with one of their delegates, use hyperjump to take a look at their assigned tasks. There is no better time to ask how certain items are coming and if they will deliver on the assignment on time.

If talking on the BlackBerry, use a headset and the ALT+ESC windowing feature to work within ToDoMatrix while talking on the phone.

Here is an interesting note for many ToDoMatrix Pros. REXwireless users report that sending delegates an emailed task from ToDoMatrix actually results in better follow-through by the delegate. We assume the psychology behind the scenes is that the delegate realizes that there is a systematic audit trail between ToDoMatrix and the email that has been sent. While the user loses the cachet of having what seems like extraordinary memory, having tasks done on time makes up for it.

Of course, with certain people that you "delegate" to, such as your boss or your spouse, you are probably better off sending a more personal and customized e-mail. It really comes down to personal preference and personality.

Daily Process (Working with an extended team of people):

Sometimes, tasks are assigned to people that are not normal "repeat" delegates. For process purity, we suggest that a person create a delegate for every delegated task; however, some users may decide that there is no reason to create a delegate folder for such one-time activities.

If you decide to do it this way, mark these tasks as "Waiting For". Clearly, you must wait for the task to be completed. By marking these tasks with this status, a best practices user can review all the items they are waiting for by navigating to the ALL cabinet (or a Drawer) and then viewing all tasks, plus applying a filter for status = "waiting for".

Daily Process (When You Complete a Task):

Best practice calls for a person to decide what their next action is within a project-folder at the time they complete the current task.

ToDoMatrix offers an option navigation dialog feature in Profile / Preferences for GTD. We suggest turning the feature on. This feature prompts a user for whether they want to hyperjump to the project-folder upon completing a task within the folder so that they can immediately make a decision in regards to the next action within that project.

This dialog only works when a person is working within special views within ToDoMatrix. Please note that this feature is disabled in when you are in the Alert pop-over window or the Quick Review Wizard pop-over window because it would cause disruption to the workflow.

Daily Process (End of Day Mini-Review):

It is an excellent idea to get in the habit of looking through any items that remain in Views / Due Today + Past Due late each afternoon. Often, a person will find a couple of important items that deserve a bit of attention. Many people find that they are running low on energy late in the day, but the habit of trying to prevent undone items from spilling over to the next day is really effective.

Weekly Process:

Although people strive for real-time task management perfection, most people's systems degrade a bit during a week's fast and furious activities.

Keeping the system fresh, crisp, and relevant is critical. Once weekly, the user should review every project-folder and make adjustments as needed. Once again, the Quick Review Wizard is helpful in this regard, and can be run against natural project folders or special views.

In our personal experience, the weekly review is best done after a person recharges their batteries, not on Friday afternoon when the mental energy is mostly spent.

The weekly review is an excellent time to use the e-mail completed todo's / purge completed todo's functions to make sure your system stays lean and mean. Although weekly purging is not required, it is a good idea to archive and purge at least once monthly.

This weekly review becomes even more important when the Covey concepts are overlaid, as FTF is focused on weekly planning and not daily details.

7D) ToDoMatrix Implementation Recommendations for the Covey Phase

Once you are well on your way to manage your tasks using GTD processes, the next phase is to overlay your tasks with Stephen Covey's strategic planning components. By this point, it's a good idea to have read or listened to *Seven Habits of Highly Effective People* so that you have a firm understanding of Quadrants, Roles, and Goals.

As a reminder, David Allen's GTD is the superior process for getting a lot of things done efficiently while Covey's concepts, in our opinion, help change the phrase getting things done into getting more of the best things done.

Setting up ToDoMatrix preferences for the FTF overlay phase:

When you are ready to begin the overlay FTF on GTD, navigate to "Profile / Preferences" on the folder-view menu and activate the 5th dimension which is preconfigured as "quadrant" and the 6th dimension which is preconfigured as role. The 7th dimension is not preconfigured but can be used for goals in the Covey scheme, although many people may opt to use it for some other purpose such as client number.

Initial Startup on the GTD+FTF phase:

Most people only need several quality hours to add the Covey overlay. It is helpful to do this work on the weekend, away from ringing phones and constant emails. A long transcontinental flight is especially helpful if timing works out.

By this point, you should have identified the various roles you have in life. For example, a person might be a Doctor, Mother, Daughter, Sister, Close Friend, and Brownie Troop Leader. Configure your roles by navigating to the 6D – Roles Drawer on the folder tree and changing the appropriate folders.

Next, make a review pass through your entire ToDoMatrix, editing the Quadrant and Role fields. As a reminder, all tasks and projects fall into one of four quadrants:

1. Quadrant One – Urgent and Important Projects and Tasks
2. Quadrant Two – Important but Not Urgent Projects and Tasks
3. Quadrant Three – Urgent but Not Important Projects and Tasks
4. Quadrant Four – Not Urgent and Not Important Projects and Tasks

We suggest configuring the 7th dimension as Goals. If you don't keep your eye on where you want to go, it is easy to lose your bearing and find yourself no closer to achieving your goals a year from now. The idea is not to clutter your ToDoMatrix with Goals that you have no plans for touching for years; rather, add just a top ten goals that you plan to do something about in the upcoming months or year. Then assign tasks that are stepping stones toward each goal.

After this pass, use REXdesktop to print off your ToDoMatrix but from the new Covey big picture perspective. We suggest printing separate reports for each role, and for each quadrant.

The reports from the “roles” perspective help you discover if you are out of balance. Most people discover that 80% or more of their tasks and time are dedicated toward one role (usually work) and very little time is planned for the remaining roles in their life. The doctor above might find out that she doesn’t have a single item planned for her role as a “close friend” – it is hard to be a close friend to anyone if you don’t allocate any time.

The four reports from the quadrant perspective help you discover if you are working on the best things. Clearly, any tasks that dropped into Quadrant 4 should simply be deleted from your ToDoMatrix. Tasks in Quadrant 3 should be closely looked at to see if they can be deleted or deferred. Most people usually discover that they don’t have a lot of tasks in Quadrant 2. These strategic “compass” tasks are the ones that make most of the difference in a five year accomplishment horizon.

The final step in the initial startup is to add and delete tasks and projects so that your immediate plan, which is what ToDoMatrix really represents, lines up better with your roles, with what is strategic, and with your goals if you have decided to use that component. This step might take some time – aligning the compass requires far more thought than efficiency.

Weekly Process for GTD+FTF:

The best practices ToDoMatrix Pro is already doing daily and weekly reviews as part of the GTD process. Covey’s concept is that planning should be first and foremost a weekly focused process.

At the time a person does their normal weekly review, we suggest continuing with the GTD pass first, then look at the Covey dimension to double-check how you are balanced and aligned with strategic Quadrant 2 tasks. Add tasks that make sense to achieve better balance.

Then, pick no more than 3 strategic “Quadrant 2” items that you will do in the upcoming week. It is vital that a person make and keep this commitment; therefore, pick only three or less. If a person picks more than that, a crazy-unexpected-busy week will happen soon enough and the strategic items will fall by the wayside. Three strategic items (actionable tasks, not projects) if accomplished without fail, will deliver life-changing results within a year or two. Schedule these three tasks with due dates and alerts. Change the status to next action and the priority to critical.

As a final step, make notes in a simple journal (we suggest ToDoMatrix’s sister product IdeaMatrix) that reviews your Top 3 “Quadrant 2” accomplishments for last week and Top 3 “Quadrant 1” accomplishments for last week. Add a few words about what happened that week, what was unexpected, what priorities changed. It is important to be honest with yourself. Seeing your accomplishments and the weeks you came up short with help build the integrity you need to keep your commitments to yourself.

A written review helps a person think strategically and learn from tough weeks. Don't forget to set a ToDoMatrix regenerating weekly task to remind your to complete your short weekly journal.

Daily Process for GTD+FTF:

The best practices ToDoMatrix Pro lives primarily in the next action daily realm of GTD. However, when FTF is overlaid, each day is started with one additional step: navigate to your quadrant 2 view, and sort by due date or filter for next action status. The three strategic tasks for the week will appear. Make a commitment to complete those three each and every week without fail. It will make a positive impact on your life.

8.0 ToDoMatrix: Continuing the Evolution of Best Practices

Implementing best practices is always a trial and error process, and certain aspects fit some people more than others. ToDoMatrix was designed for flexibility so that a wide variety of people and methods could be accommodated.

Given the complexity of the best practices topic, we will introduce user forums at <http://REXwireless.com/bestpractices> in the next few weeks. This forum will be moderated as we believe most forums lose their value in direct correlation to the amount of discussion that runs off topic. We have high hopes that the user discussion results in great value, but reserve the right to suspend the forums if they appear to be missing our goal of developing best practices and tips for using ToDoMatrix, IdeaMatrix, and our other upcoming products to their fullest potential.

9.0 Final Thoughts from the REXguys

Careful students of GTD or FTF probably have realized that we have taken what we believe the best usable ideas from both, not all the ideas within the methodologies. During this process of converting concepts to mobile software, we realized that there is a missing piece of the puzzle that neither author highlights enough.

Stephen Covey clearly focuses on the strategic big picture. His discussion starts with the end in mind, asking the reader to imagine their eulogy and the legacy they would like to leave. Once the end is in mind, he asks the reader to imagine their vision of the future, and then transition to goals to get there.

David Allen focuses on the other end. He spends over 90% of his time describing superior process for getting a LOT of things done efficiently, and keeping up with the deluge. Mr. Allen does spend some time talking about a person's big picture from 40,000 feet and 20,000 feet, but this is not the focus of his teachings.

After we read and discussed both methods and recommendations ad nauseam, we hit on the thought that the two sides are missing the important piece in the middle. At REXwireless, we call it "missions", which should not be confused with Covey's thoughts on mission or for that matter, mission statements.

Understanding where you want to be, twenty or forty years hence, is great. Unfortunately, reality usually offers a twisted multi-step path involved to get there. Let's say a person's long-term vision is retiring with a chalet and plenty of funds on the shores of Lake Cuomo. How one gets there is really a set of missions, usually longer than one year but usually less than five or ten years.

If one were to follow Covey's direction, the impulse to quit that seemingly dead-end job comes to mind immediately. A person almost always thinks "What the heck am I doing here? This has little to do with where I want to get to." At the other end of the spectrum, Mr. Allen has a person knocking off tasks so efficiently there is little time to check the GPS and make sure he or she is heading in the right direction.

We believe that life is best visualized as a long term goal destination, which requires a set of distinct missions that zigzag a path across the countryside. It is rare that one can set a course directly from where they are today to where they want to be decades later, unless the bank accounts are overflowing.

For example, imagine Henry, a kid that wants to be a renowned neurosurgeon one day. If he is in high school, understanding why his 'theater experience' class is important is a difficult thing. Yet, if Henry rethinks the path in terms of distinct missions or chapters in his life, it becomes easier to see the point. If he gets a superior grade point in high school, he has a far better chance of admission into a top-notch medical school. Therefore, the "mission" of high-school and his specific grade in theater suddenly make sense, even though the effect of theater on his ultimate career will be negligible. The next chapter or mission in Henry's life would be excelling as an undergrad, even though classes like geology might bore him to tears. Each step makes better sense when one sees each as a mission toward the greater goal.

Clearly, we think highly of both Covey and Allen and have re-architected ToDoMatrix to empower the methods. We strongly believe that a person who implements and maintains best practices task management over a number of years will receive great benefits. Finally, we believe that there is a bit of magic in the middle between forty years and this month: Define middle-term "missions", stay focused on the compass, stay disciplined on the process, and you are far more likely to achieve greatness.

We suggest creating a special off-to-the-side drawer called "Vision-Missions-Goals" within your ToDoMatrix. Within this drawer, create folders for visions, principles to live by, missions to complete, important goals, and fun goals too. Then, follow the Covey exercises to determine and write down your visions, your principles, the distinct middle term missions that will help you get there, as well as goals, important and fun, that you want to achieve. Review these monthly. Think about what you will do this month to make a first down on some of them. Add a couple tasks to ToDoMatrix that matter from the Vision-Missions-Goals perspective every month and watch the results.

One last thought about visions and missions. Each person has many roles in life; therefore, you will probably find that you have parallel missions running simultaneously across your different roles. It makes this puzzle we call life more interesting, as we strive to keep everything in balance while still having fun along the way. Thinking things through, writing things down, and staying within a well thought-out process makes the puzzle easier. We hope you become a Jedi Knight of life management and think of ToDoMatrix as your trusty lightsaber.

Getting lots of things done is good, but getting a lot of the best things done is far better.