

Personal Productivity Checklist of Systems

Time Management				
☑ Calendar	If at all possible, keep only one master calendar instead of multiple calendars in multiple places.			
	Capture everything in one place so you'll be able to prioritize.			
Data Management				
☑ Contacts	Centralize all contacts into one system, and delegate the data entry if necessary to make sure the system is updated.			
☑ E-mail	Use rules and folders to automatically sort your e-mail as much as possible. Make sure you don't interrupt your work with e-mail processing any more than necessary.			
☑ Electronic File Structure	Create a file structure that makes sense for your home and business needs so you (and others sharing the information) can file and find things quickly.			
✓ Data Backups	Ideally a backup system should be (1) Remote, (2) Automated, and (3) Secure. We like www.carbonite.com .			
☑ Password Storage	Don't risk your crucial information by using the same passwords for everything or using other insecure practices. Have a secure system for storing these like www.splashid.com .			
☑ Software Licenses & CDs	Software is very expensive, but many homes & businesses fail to document the simple license and purchase information that could save them hundreds or thousands in repurchasing costs later.			
☑ Financial Data	Along with using software like Quicken or QuickBooks, you'll need systems for storing receipts and statements too. Homes and small businesses can often use January-December accordion files to make this simple.			
Paper Management				
☑ Quick Reference	Quick Reference papers are those you need often for handy reference, like frequently called numbers.			
☑ Reference	Reference papers simply need to be kept without any action required.			
☑ Archives	An archive system is needed for older reference items.			
☑ Quick Action	Quick Action papers need simple actions taken fairly immediately, like bills to be paid or calls to be made.			
✓ Projects	Projects are collections of papers pertaining to multiple steps of actions that have a beginning and end.			
Space/ Physical Items				
		Examples	Priorities	Places
 ☑ Prioritize what's in your space by frequency of use and accessibility, using our "ABCD" method. ☑ Use a label maker to establish the "homes" for your items after you've organized them. This is particularly important when sharing a space with others. 		Pens, stapler, phone	A Things you use all the time	On the countertop, in most handy cabinets and drawers
		3 hole punch, printer cartridges	B Things you use most of the time	In relatively accessible places, maybe behind or above A items
		Holiday decorations	C Things you use once or twice a year	Less accessible places, up high
		Archived tax records	D Things you are not using	Store out of the flow of daily living