Taming your tasks:
Five steps to extreme productivity

Joe Woodard
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Career Trainer to over 100,000 accounting professionals

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

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

• Unlearning what you have learned: Productivity myths
• Clearing the way: Overcoming productivity roadblocks
• The productivity and priority connection
• Bonus material
Unlearning what you have learned: Productivity myths
Myth: You can manage time.
Truth

You manage projects and tasks considering…

• Priorities
• Responsibilities
• Outcomes
Myth: The measurement of productivity is efficiency.
Truth

The measurement of productivity is
• Outputs
• Effectiveness
• Mental Clarity
Productivity measurement – Mental clarity

White space
Boomerangs
Constantly Capture Ideas
(e.g. Using Siri)
Myth: You can multi-task.
Truth

You can perform only one task at a time.
Result of “Multi-tasking”

Distraction
Disrespect
Inefficiency
Diminished effectiveness
Decreased mental clarity

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

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

And waiting there for Joe to go
Is pretty cold work in the snow.
Clearing the way:
Overcoming productivity roadblocks
Clearing the fog of negative thinking - Future

Fear, Uncertainty and Doubt (FUD)

The natural response to FUD is procrastination or even paralysis.
• The inoculator of FUD isn’t courage… it is action.

Worry, Dread and Fretting

Worry is mental energy spent on things that may or may not happen.
• The inoculator to worry is planning.

Dread is mental energy spent on things that are inevitable.
• The inoculator to dread is planning, though the plan is primarily responsive.

Fretting is mental energy spent on things over which you have no control.
• The inoculator to fretting is acceptance and adaptation.
Clearing the fog of negative thinking - Present

Anxiety, Strife, and Self-Consciousness

**Anxiety** is negative assumptions and expectations about circumstantial imperfections.
- Inoculators to anxiety are planning, action, preparation and positive thinking.

**Strife** is the normal and inevitable frictions of life exaggerated by the pursuit of justice.
- Inoculators to strife are forgiveness, grace and mercy.

**Self-consciousness** is viewing and valuing yourself through the eyes of other.
- The inoculator to self-consciousness is confidence.
Clearing the fog of negative thinking - Past

Guilt, Regret and Remorse

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

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

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

Procrastination prioritizes tasks and actions solely on the basis of:

- Fun
- Easy
- Predictable

Urgency and panic neutralize the influence of fun, easy and predictable, generating action through reaction.
Overcoming procrastination → Reaction-based living

Procrastinator inoculators are:
• Prioritization
• Intention
• Micro-actions to jump start desire

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

Recommended Viewing: TED Talk by Tim Urban on Procrastination
The productivity and priority connection
Begin with your vision, mission and purpose.

“Opportunity does not equal obligation” – Andy Stanley
Eisenhower Decision Matrix

**MANAGE**
Crises & Pressing Problems
Demand + Necessity
Daily Fire-Fighting
Be Quick to Delegate

**FOCUS**
On Strategies & Values
Opportunity + Planning
Keep Critical Thinking
Consider the Macro

**AVOID**
Interruptions & Busy Work
Illusion & Deception
Not Your Emergency
Minimize Investment

**LIMIT**
The Trivial & Wasteful
Escape & Waste
Entertainment Only
Use to Minimize Stress
Eisenhower Decision Matrix

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

Build each quadrant into each day.

Tip: Tackle the most challenging or dreaded tasks at the time when you are most alert and least distracted.
Achieving and maintaining zero inbox
David Allen’s Four “D’s”

Delete it

Delegate it → “Boomerang” list

Do it (including respond to it)

Defer it → Send to note solution or task

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

Step 1: Adopt a note solution.
- Store emails for future reference.
- Store emails where you need to track a response (email replies & delegated tasks).
- Store emails that you will act on later (deferred tasks).

Step 2: Remove all emails older than 60 days.
- Create a folder called “inbox through xx/xx/xxxx”.
- Transfer all emails older than 60 days into this folder.

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

Step 4: Experience clarity of mind.
Maintaining a zero inbox

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

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

Route as Many Inputs to Your Inbox as Possible

Use Tasks for Date Specific Items that Require No Team Collaboration

Route to Team Collaboration Solution (e.g. Slack, Project Management System or MS Teams) if Delegating or Collaborating

Use a Note Solution for...

For Deferred Items that are Not Date Specific Route to Note Solution

For Delegated Items Route to Note Solution

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

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