

The background is a soft watercolor illustration. The top half features a pink and orange gradient sky with small white dots. Below the sky are blue and purple mountains. Several small black birds are scattered across the scene, some in flight. The title 'Productive By Design' is written in a dark blue, handwritten-style font, centered in the upper half of the image.

# Productive By Design

GET MORE DONE AND HAVE MORE  
TIME FOR WHAT MATTERS

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GET MORE DONE AND HAVE MORE TIME FOR WHAT MATTERS

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# 1

## Introduction

*“The time to relax is when you don’t have time for it.”*

–Sydney J Harris, American journalist

**Wednesday, May 9<sup>th</sup>, 2012.**

Suddenly, my hands start shaking uncontrollably on the steering wheel.

I look down in shock, which is probably not the wisest thing to do during the evening rush hour. Then, slowly but surely all the vehicles around me begin to blur. I’m feeling dizzy now. My mind is screaming to get my attention. A thought jolts into my mind with a rush of adrenaline: *“I can’t breathe!”*

The last thing I remember seeing is the backside of a blurry U-Haul moving truck approaching my windshield. I can only just make out the big bold words on the back, now filling my entire view: “Make Your Move EASIER!” My limbs aren’t

responding. Foot still on the accelerator, hands still shaking.

I know I should be terrified, but my body remains like a deer in the headlights. Silent and petrified.

I'm watching the truck approach me in slow motion.

This is it. This is the end, isn't it?

This is how my life comes to an abrupt end.

An uneventful drive home for the average guy experiencing a stressful day at work.

Then, all at once, everything fades to black.

\* \* \*

The next thing I know, I'm in a Starbucks parking lot, engine off, key still in the ignition, hands still shaking.

Somehow, miraculously, I must have managed to take control of the wheel just in time to pull off the freeway and take the offramp to the nearest stop. Unfortunately, or perhaps for the best, I don't remember any of this happening.

I stare ahead at the brick exterior of the building in front me, quietly reflecting on the highway, then on my day. Then my life.

Tears start to stream down both of my cheeks as I just sit there alone in my car. After far too much sobbing, I call my wife to tell her what happened. After a long while, I take the side roads to arrive home safely.

Now over 13 years ago, I realized this was my first - and last - panic attack to this day. It was also the moment that changed my life for the better.

\* \* \*

Earlier that day I had just realized that all of the work we had been doing for months was no longer required. The main project we had been committed to delivering was cancelled, suddenly and without warning. All of the deliverables our team worked long hours and overtime to create, all of the efforts to create something our clients would need and value. In fact, many of our positions were no longer required. The organization was rightsizing. And, worst of all, it took me by complete surprise.

I had always thought my life would be ok.

But, upon reflection, I realized it wasn't really ok. *I wasn't really ok.*

Unfortunately, it took nearly slamming head-on into a U-Haul truck to realize this. And you never would have guessed it from the outside.

I had a job, a loving partner, even a home in the suburbs.

I should have been happier than a clam.

The truth is, and I only learned this later on, is that I had never really examined the way I was living on a deep level, and especially on how I spent my time, to reflect on whether it was the life I truly wanted.

I had been drifting through life far too long, and it took nearly dying to figure it out.

The pain I had felt that day, after the incident on the highway,

was more than anyone should have to feel. It was the deep pain of disappointment and regret. Not in external circumstances, but in myself. It was the pain that comes from realizing I should have been doing more with my life. I should have been ready for almost completely losing my only source of income.

I should have been taking more time for myself and for my health.

I should have been thinking about the kind of work that made me excited to get up every day. The kind of work the world desperately needed and wanted, and the kind of work that made the most of my talents and aspirations.

I should have been serving the world in a more meaningful way. *I should have been designing a productive life, not just living one.*

It was this pain of regret that drove me to look for answers.

To look for a better way to live a life of purpose and productivity, to provide more contribution to the world.

**If you've ever had this pain that told you that you should be providing more to the world, and living a life of greater meaning and purpose, then this book is exactly what you need, and I'm so glad you're here for it. I wrote this for you.**

So, if this is you, what will you learn in this book?

In short, reading this book will give you science-based strategies that help you to make the most of the limited time you have on planet earth to do what fires you up. And being 'fired up' is another way of saying 'aligned with your vision', 'impactful',

'fun', 'challenging', and 'purposeful'. Hopefully, the insights in this book will help you to define (or refine) the fire you have in mind for your own life.

It's important to note that the advice in this book is truly from science as I am no guru myself. Far from it.

Honestly, I wrote this book because I have made a lot of mistakes with how I used my time, what I prioritized, and what I did to earn a living. My hope is that you don't repeat what I did. As you can see already, I made so many mistakes that it almost ended my life. So, not exactly a role model to follow! To give you just a few examples:

1. I sorely lacked vision for how I earned a living. I was basically winging it each day, moving with the flow.
2. I didn't know what I truly valued and found meaningful in my work, and it led to income without purpose, a job without a meaningful contribution to call my own.
3. I lacked focus with how I spent each hour of my day. I would start on one thing and then skip to another, trying to get it all done and not accomplishing much at the end.
4. I didn't think about the cost of doing one thing over another. I would spend too much time on things that didn't move me forward.



5. I stressed about things that didn't really matter.  
*Constantly.*
6. I didn't measure anything, and it showed.
7. I procrastinated on my goals so much that I never went anywhere. I would dream at times of something great, some better way to serve the world with my talent, and then fall right back to the distraction-filled life that was just enough to get by.

On a surface level, you can see I was not doing well. But, let me tell you how it felt. Every day I felt like I was put on earth to do something great, something so much better than what I was actually accomplishing, yet not really knowing what that was supposed to be. At the end of each day, I felt like I was falling short. It's the worst feeling imaginable and no amount of money or time away from your daily work can fix it. It eats at you each day.

I wrote this book so that, hopefully, you *never* have to feel the same way. Or at least, so I can impart whatever crumbs of wisdom I learned throughout my journey that followed that fateful near-death experience.

Since that day on the highway, I did a lot of research, taking out the maximum number of books from the library on personal development for weeks on end. I read hundreds of blog articles and journals. I listened to countless personal development podcasts and audiobooks. I took a lot of walks in the woods by myself as well, which was not only great exercise but also an

excuse to take in more audiobooks. I spoke to people that appeared to be doing things right. Many of the books made it clear, and I knew they were right, that the problems I was facing were not out there. It was me.

When I read some productivity tip or life strategy on a blog, I tried it. Did you know certain physical activities actually reduce procrastination on your work, even as you take time away from work to do them?

When I read in a book that something worked for the author, I tried it as well. Believe it or not, creating a to-do list in the *wrong* way can actually make you want to *avoid* doing anything on the list. Who knew?

Unfortunately, I found out after a few weeks that the advice I was reading was often contradictory. To-do lists were seen as either effective or counterproductive. Having a written vision was seen as either liberating or constricting. Planning out your day was seen as a game changer, or completely unrealistic.

To sort through the noise, and to avoid the absurdity of implementing contradictory strategies, I quickly shifted gears and started searching online to see what the peer-reviewed scientific studies had to say about all this productivity and self-improvement.

Some articles were critical about what they saw as gurus sharing what appeared to be sure-fire ways to succeed in life, noting that while the strategies that have evidence of working may be simple to explain, personal productivity is not necessarily easy or simple to put into practice. This definitely rang true for me. I don't know how many times I'd heard

someone say, in so many words, to succeed "*just do it!*" Or worse, just believe you'll have it, and you'll manifest your success. If it were that easy and that simple, then everyone would be successful to the degree of their wildest dreams. But as we all know, action plays a key part in success, among many other things.

Long story short, some of the best advice I could find is distilled in the following pages, so take what you find useful and throw the rest away. The science is sound but of course the path you take is your own. And you must always stay true to your path.

I'm eternally grateful that the events of my past turned my life around before it was too late, and my hope is that you too can have the life you may have only dreamed of before, because life really is too short, and if there's anything I've learned, through trial and error, it's that you have incredible potential and incredible opportunity.

And so, I hope you enjoy these science-based strategies, and that you apply them to live the life you deserve.

# 2

## The Science of Procrastination

*“The really happy people are those who have broken the chains of procrastination, those who find satisfaction in doing the job at hand. They’re full of eagerness, zest, and productivity....”*

– Norman Vincent Peale, American minister and author

### Apples and Tigers

**W**ould you rather have one apple today, or two apples tomorrow? Research out of Cornell University indicates, as one might expect, some of us prefer an apple now while

others are willing to wait.<sup>1</sup> In other words, for some the gains of instant gratification are just too good to resist. And this is when we would get *twice as much apple goodness* by waiting just a single day.

Now, let's make this more interesting. Would you rather have one apple in one year, or two apples in one year and a day? The same research shows that no one chooses one apple in one year when they could wait one day later and receive twice as many apples.

Strange, right? In both cases the difference between the two options is a single day, but our reaction varies depending on the timeframe provided.

This concept is referred to as *dynamic inconsistency*.<sup>2</sup> It says that we value future rewards less than present rewards. For example, survey participants in the study referenced above had discount rates of 219 percent for rewards received one month from now, and then 120 percent for one year, and 19 percent for 10 years. This equates to a decrease of 99% in less than one year, and then a paltry decrease of 11 percent in the following nine years. A difference of over 9 to 1.

So, why does this matter? It shows us that not only do we value rewards in the present more than in the future, but we also value them *much, much* more.

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<sup>1</sup> Thaler, Richard. *Some Empirical Evidence on Dynamic Inconsistency*. Economics Letters. Volume 8. Issue 3. 1981. p. 202. [http://faculty.chicagobooth.edu/richard.thaler/research/pdf/Some Empirical Evidence on Dynamic Inconsistency.pdf](http://faculty.chicagobooth.edu/richard.thaler/research/pdf/Some%20Empirical%20Evidence%20on%20Dynamic%20Inconsistency.pdf).

<sup>2</sup> Ibid.

Consider what I like to call the *Smartphone Effect*. All else equal, when left to our own devices, no pun intended, doing literally anything<sup>3</sup> with our smartphones is more valuable to us in the moment than working on what we want to achieve over the next five years, let alone tomorrow. The benefit we get from these devices is instantaneous.

We use our phones, tablets, and other screens even when we *know* that the report due tomorrow is important for our client. We watch episode after episode on Netflix, even if going to the gym would be better for our health. And we mindlessly browse social feeds online even if working towards our goals to learn piano or rock-climbing would give us more joy in the long-term.

What's fascinating, and a little bit frightening, is that our myopic focus on present benefits over future success, as some evidence suggests, is not limited to personal decisions about apples and iPhones. It also relates to critical managerial decisions that affect whole organizations.<sup>4</sup> According to Kahneman and Lovallo, two well-known behavioral economists, the phenomenon of present bias "... may become *even stronger* when a choice becomes a subject of debate, as is commonly the case in managerial decisions."<sup>5</sup>

When decisions become more complex, especially when

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<sup>3</sup> Yes, even watching the 1980's hit series Full House on Netflix.

<sup>4</sup> Kahneman, Daniel; Lovallo, Dan. *Timid Choices and Bold Forecasts: A Cognitive Perspective on Risk and Risk Taking*. Management Science. Issue 39. January 1993. pp. 17-31.  
[http://www.anderson.ucla.edu/faculty/keith.chen/negot.papers/KahnemanLovallo\\_ChoicForcastsRisk93.pdf](http://www.anderson.ucla.edu/faculty/keith.chen/negot.papers/KahnemanLovallo_ChoicForcastsRisk93.pdf).

<sup>5</sup> Ibid.

there's a greater personal or organizational cost, we instinctively *increase* our avoidance of any future uncertainty. As a result, playing another round of *Candy Crush Saga*, or checking our e-mails for the fourteenth time, is a lot more compelling to our risk-reward brains than the *chance* of a grand future vision of ourselves or of our projects, especially if it requires any significant effort to achieve.

Why is this? Some evidence suggests that discounting future rewards might be an adaptive response to uncertainty, related to reward size and pursuit times.<sup>6</sup> After all, our foraging ancestors would have had to constantly evaluate whether to take on the smaller, more immediate mammal in the short term or commit to a longer, more complex and potentially dangerous hunt for a larger mammal.

While we may rationally think taking on a long-term goal with future benefits is no big deal, to our monkey brains this is akin to choosing to hunt the tiger over all the cute little bunnies sitting around us just waiting to be eaten. Maybe just one more game of *Candy Crush*...

### **See Wrinkles, See Results**

If you've ever wished you could see your future, *be careful what you wish for*. In a study aimed at understanding our bias for

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<sup>6</sup> Kagel, John H; Green, Leonard; Caraco, Thomas. *When foragers discount the future: constraint or adaptation?* Animal Behavior. Volume 34. Issue 1. February 1986. pp. 271-283. [http://dx.doi.org/10.1016/0003-3472\(86\)90032-1](http://dx.doi.org/10.1016/0003-3472(86)90032-1).

present benefits over future rewards, Dr. Hal E. Hershfield of NYU showed participants elderly versions of themselves using a combination of photo aging software, three-dimensional models, and virtual reality.<sup>7</sup> They found that when we see a vivid future of our elderly selves, we are more likely to make decisions that allocate greater benefits to the future. In other words, we can reduce our present bias.

You can see the effect for yourself. There are dozens of ‘aging’ Web sites and apps, but one that I like the most is AgingBooth. Just upload a picture of yourself and you’ll see the result in seconds. You can even save the photo and keep it as a constant reminder that the days of your life are rapidly passing away. And who doesn’t love that?

I can attest that this exercise is both creepy and effective. Although I don’t have the picture framed on my wall, I do look at it on my laptop from time to time when I’m thinking about my long-term plans. And believe it or not, it does motivate me to think about how my decisions affect me now and in the future, wrinkles and all.

### **Do it First Thing**

Growing up, I was always on the lean side. So, you can imagine my shock when I entered my thirties, and my weight

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<sup>7</sup> Hershfield, Hal E; et al. *Increasing saving behavior through age-progressed renderings of the future self*. Journal of Marketing Research. Volume 48. November 2011. pp. S23 – S27. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3949005/>.



mysteriously began to rise. There's a term for my condition. According to Urban Dictionary, *Dad Bod* is "a male body type that is best described as softly round..."<sup>8</sup>

Since turning thirty I've kicked up my exercise regimen to compensate. Well, I've tried. The truth is I would exercise only occasionally and not with any consistency. When I got home from a busy day of work, I would receive a notification on my phone reminding me to work out, and I would then say to myself, "thanks, but no thanks" and promptly sit down for another episode on Netflix.

With the birth of my daughter Elizabeth, I realized my evenings were becoming a lot busier. To better manage this shift, I started working out in the mornings and I quickly found I could keep my commitment.

You may have a similar story. It's intuitive that our energy reserves to exercise would generally decrease as the day goes on. What's less obvious however is that self-control is also a limited resource that generally wanes throughout the day.

As research shows, acts of self-control "cause short-term impairments in subsequent self-control, even on unrelated tasks."<sup>9</sup> In other words, when we attempt to work against our 'monkey brains' and defer current pleasure for future gain, this takes mental energy that is a scarce resource. If we've already

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<sup>8</sup> Urban Dictionary. *Dad Bod*. June 17, 2015.  
<http://www.urbandictionary.com/define.php?term=Dad%20bod>.

<sup>9</sup> Baumeister, Roy F; Vohs, Kathleen D; Tice, Dianne M. *The Strength Model of Self-Control*. Current Directions in Psychological Science. Volume: 16. Issue 6. December 1, 2007. pp. 351-355. <http://journals.sagepub.com/doi/pdf/10.1111/j.1467-8721.2007.00534.x>.

exhausted our mental energy reserves from previous ego-depleting tasks in the day, we're much less likely to succeed in our plans to escape acting out for the benefit of here and now.

What's ego-depleting? Roy Baumeister of FSU and his colleagues refer to it as the act of repeatedly exercising self-control throughout the day. Some common examples of this are keeping your emotions in check, managing how you present yourself to others, making decisions, avoiding temptations, and undertaking physical exercise.<sup>10</sup>

Basically, when you get upset at that client or stakeholder for a senseless comment but hold your tongue, when you present information at meetings or social encounters, when you decide on the myriad of options about how you spend your time each day, and when you avoid yet another piece of birthday cake at work or that super-awesome brownie at Starbucks, you're depleting your ability to maintain willpower and self-control.

Does this sound like a typical day?

Is it any surprise that we tend to be at our most vulnerable to 'wasting time' and procrastinating on weekday evenings after a hard day's work?

But all hope is not lost. Researchers Megan Oaten and Ken Chang of Macquarie University, theorized that if self-regulation and willpower is indeed like a muscle, perhaps if we repeatedly practiced self-regulatory acts we could improve our strength over time. Their test was simple. Ask survey participants to

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<sup>10</sup> Ibid.

answer a series of test questions in a control phase for two months, followed by a second series of questions asked after a two-month program of regular physical exercise.

The research findings were clear. In comparison with the control phase, participants reported an increase in “healthy eating, emotional control, maintenance of household chores, attendance to commitments, monitoring of spending habits and an improvement in study habits.”<sup>11</sup> All activities that require us to display a strong degree of self-control and devaluation of present pleasure for future gain.

And if this wasn’t enough, participants also reported *significantly* less stress and a reduction in smoking, alcohol, and caffeine consumption.

So, here’s what we know so far:

- Our ability to accomplish our goals without procrastination and while avoiding immediate self-gratification requires *self-control*.
- Our self-control muscle, or willpower, is like our physical muscles in that it wanes throughout the day.

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<sup>11</sup> Oaten, Megan; Chang, Ken. *Longitudinal gains in self-regulation from regular physical exercise*. British Journal of Health Psychology. Volume 11. Issue 4. November 2006. pp. 717-733. <https://www.ncbi.nlm.nih.gov/pubmed/17032494>.

- Self-control can be hard to exercise given that we tend to discount the benefits of future rewards. This tendency nudges us to favor immediate pleasure and distraction even when there may be compelling future benefits of self-regulation.
- We can train ourselves to have stronger self-regulatory muscles by directing our focus to our future selves. This can be done in a number of ways, but one which has been proven to be effective is the act of visualizing our future self.
- We can also train ourselves to devalue present bias by practicing simple acts of self-regulation on a regular basis. Some examples include making decisions and avoiding temptations, as well as committing ourselves to regular physical exercise.

### **Putting it All Together**

Edward de Bono, creativity expert and author of *Lateral Thinking*, once said “an idea that is developed and put into action is more important than an idea that exists only as an idea.”<sup>12</sup>

In other words, without applying our knowledge, we may become smarter in an abstract sense, but we’re no further

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<sup>12</sup> De Bono, Edward. *The Use of Lateral Thinking*. New Edition. June 1967. International Center for Creative Thinking.

ahead, and no more productive.

So, here's the challenge. Throughout the book you'll have a chance to earn *Productivity Points*. The points are earned every time you implement one of the suggested actions in this book. Best of all, you can earn these points even if you're too busy to implement the action right away. As long as you schedule your committed action for a specific time in the future, you'll bank your points.

However, adding your action to your to-do list without scheduling *when* you'll work on the task will not be worth points. Immediate action, or scheduled action are the only two ways to advance.

As you gain more *Productivity Points*, you'll be able to unlock new levels in your journey. Right now, you are an *Apprentice*.

Here are the possible levels you can achieve throughout this book:

0 – 50 pts:	Apprentice
51 – 200 pts:	Executor
201 – 350 pts:	Master Executor
351 – 510 pts:	Productivity Guru

Also, if you're reading this book with a friend or as part of a reading group, you can periodically check in with your counterparts to see who's narrowing in on achieving Productivity Guru. So, track those points! Seeing the points progress will motivate you to keep going so that you can

maximize the productivity gains you achieve.

With that said, here's the first challenge:

**Do it First Thing:** for 10 *Productivity Points*, decide on the very first thing you'll work on tomorrow morning. This should be the most important thing you need to do that day.

Write this down somewhere where you'll see it when you wake up, or when you first get to work. If you work at a computer, you may want to send yourself an e-mail with the 'importance' flag so that it grabs your attention when you login in the morning. Alternatively, you can set an appointment to occur right as you arrive at work with a notification that gets sent to your phone.

The purpose of this challenge is to apply what we've learned about willpower. You want the most willpower when you need to work on that one important thing. Typically, what's most important is longer-term in focus, requires more of our physical or mental energy, requires more focus and commitment, and more self-regulation. Given that willpower wanes throughout the day, that one important thing should therefore be at the beginning of the day, wherever possible.

To help with this challenge, answer the following three questions:

1. My number one task for tomorrow is ... BLANK
2. I will book off a minimum of ... BLANK hours to work on this.

### 3. To avoid getting distracted during this time, I will ... BLANK

Consider that even if you schedule your number one task for first thing tomorrow, something might come up to put a monkey wrench in your plans. To avoid getting pushed off task, you want to ensure you plan for the common distractions that will inevitably come up.

For me, I know if it's a *really* important task and I'm at my desk, I may not be in the best environment given all of the potential distractions. In times like these, I'll close my e-mail program and go to a quiet room in the office, or to a coffee shop downstairs where I can be a bit more anonymous.

Challenge two:

**See Wrinkles, See Results:** for 10 *Productivity Points*, take about ten minutes now, or book in a ten-minute slot in your calendar over the next week, to try out AgingBooth or another aging program to see the effects of aging for yourself.

The purpose of this challenge is to apply what you've learned about the science of visualizing your future self to reduce present bias. The benefit of doing this is that it will help you to make better decisions when planning how to allocate your time, decisions that maximize your combined present and future happiness.

To help with this challenge, answer the following three

questions:

1. When looking at my older self, it makes me realize

\_\_\_\_\_.

2. When I'm my older self, my ideal day will look like the following:

I'll wake up and \_\_\_\_\_.

At mid-morning, I'll \_\_\_\_\_.

After lunch, I'll \_\_\_\_\_.

In the evening, I'll \_\_\_\_\_.

3. When friends and family read my eulogy after I've passed away, I want them to say that I was \_\_\_\_\_.

The benefit of seeing your future self comes from what you do next, and so the questions above are aimed at prompting you, in your best state of mind, to consider your long game.

In answering these questions, consider your current priorities and whether you need to make adjustments to how you allocate your time. Part of designing your ideal life is deciding what actions you need to take now to go from where you are to where you want to be.

Challenge three:



**Build Your Willpower Muscle:** for 10 *Productivity Points*, decide on whether you'd like to add in more aerobic exercise into your weekly routine. Your decision may be 'I'm actually good right now' but be sure it's a conscious decision. As we'll see later, there are numerous benefits to aerobic exercise, but for now we know that it can provide a boost to our willpower by allowing us to practice self-regulation.

Some example activities to consider scheduling include jogging, tennis, basketball, hiking, running, gym time, or simply walking.

If you're not certain what activity to choose, not to worry. Just set a time a few days from now to decide, ideally after reading Chapter 9 on Exercise, Mindfulness, and Meditation.

For best results, choose an exercise that you could try with others close to you. For example, if you're a parent, you could schedule in a game of basketball with your teenage kids, or a play-park date with your younger ones. In this way, both you and your kids gain from the benefits of self-regulation.

If you're a manager or leader, you might want to think about lunch runs or walking meetings. By doing this, everyone on the team benefits.

If you're an independent creative or solo entrepreneur, consider breaking up your day with a light jog at lunch with a friend, or a walk to a local coffee shop with an existing client.

\* \* \*

How many challenges did you successfully complete so far?

How does it make you feel? Pretty awesome, right?

While we've explored our present bias and how this affects self-control and procrastination on our long-term goals, we've also seen that we can combat this bias by deepening our connectedness with our future selves, and by improving our self-regulation.

We've learned that we can work with our tendency to lose willpower throughout the day by scheduling our most important work first thing in the morning, or first thing when we get to work.

Next, we'll examine our planning bias and how we can overcome it to set goals we can achieve. We'll also discuss the importance of our perceived control of time and how it may be more important than any to-do list or plan we can conceive.

# 3

## Time Management and Productivity

*“For it is an undoubted truth, that the less one has to do, the less time one finds to do it in. One yawns, one procrastinates; one can do it when one will, and therefore one seldom does ...”*

– Lord Chesterfield, British statesman,

### Time Representation and the Planning Bias

**W**hen Philip Dormer Stanhope, Fourth Earl of Chesterfield, penned these words<sup>13</sup> to his son in 1757, there were no

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<sup>13</sup> Stanhope, Philip Dormer. *The works of Lord Chesterfield, including his letters to his son: Letter CCLXXXV*. Authored September 30, 1757. Published 1838. p. 533. Harper & Brothers.

computers, no e-mails, no smartphones, and none of the modern distractions we enjoy today. In fact, it had only been five years since Benjamin Franklin conducted his electricity experiment with a kite, a key, and a storm.<sup>14</sup>

Even so, his words ring true as an insight into the concept of time itself. It is both scarce and plentiful. Not enough for one and more than enough for another. When we perceive we have more than enough, we tend to squander it. When there is barely enough, we make the most of it. Time can crawl and time can fly.

Perhaps the best explanation of this phenomenon is described in an article published back in 1983 titled *Concepts of Time in Quaternary Prehistory*<sup>15</sup>, a discussion piece for the Annual Review of Anthropology that aimed to articulate our understanding of time:

*“Time has a dual aspect – as sensation and representation. ... There is no single time, but rather many different “times” and many different ways of representing them.”*<sup>16</sup>

Though we can’t control the succession of time, we *do* have control over how we think about the events and actions we wish to perform. This is why when we’re speaking about time management, what we’re really managing is our *representation*

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<sup>14</sup> Cohen, Bernard. *Benjamin Franklin's Science*. 1990. p. 130. Harvard University Press.

<sup>15</sup> Bailey, Geoffrey N. *Concepts of time in Quaternary prehistory*. Annual Review of Anthropology. Volume 12. 1983. pp. 165-192. [http://www.academia.edu/20402924/Concepts\\_of\\_Time\\_in\\_Quaternary\\_Prehistory](http://www.academia.edu/20402924/Concepts_of_Time_in_Quaternary_Prehistory).

<sup>16</sup> Ibid.

of the events and actions we wish to perform. Once we properly align our representations, we can more effectively get work accomplished.

For example, one of the most common symptoms of poor time management is the feeling of stress and overwhelm that occurs when rushing to finish something for a deadline. According to Daniel Kahneman, author of *Thinking, Fast and Slow*, and his colleague Amos Tversky, we tend to base our estimates on a single example memory, our representation of the work, which is typically our best experience as opposed to calculating the average time it took. As a result, we underestimate and end up rushing to complete work.<sup>17</sup> According to one review of decades of cognitive research by Owen O’Sullivan at the University College in Dublin, we “...generally exhibit a *pervasive* future bias in favor of optimism.”<sup>18</sup>

Having someone else examine our estimate is key. Research shows that the planning fallacy occurs *even when* we have knowledge of past tasks of a similar nature that took longer to complete than planned.<sup>19</sup> We tend to discount these events, but

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<sup>17</sup> Kahneman, Daniel; Tversky, Amos. *Intuitive prediction: Biases and corrective procedures*. Advanced Decision Technology. June 1977.  
<http://www.dtic.mil/dtic/tr/fulltext/u2/a047747.pdf>.

<sup>18</sup> O’Sullivan, Owen P. *The neural basis of always looking on the bright side*. Dialogues in Philosophy, Mental and Neuro Sciences. Volume 8, Issue 1. 2015. p. 11.  
<http://www.crossingdialogues.com/Ms-A14-09.pdf>.

<sup>19</sup> Buehler, R; Griffin, D; Ross, M. *Exploring the “planning fallacy”: Why people underestimate their task completion times*. Journal of personality and social psychology. Volume 67. Issue 3. 1994. p. 366. [http://homepages.se.edu/cvonbergen/files/2013/01/Exploring-the-Planning-Fallacy\\_Why-People-Underestimate-Their-Task-Completion-Times.pdf](http://homepages.se.edu/cvonbergen/files/2013/01/Exploring-the-Planning-Fallacy_Why-People-Underestimate-Their-Task-Completion-Times.pdf).

when outsiders predict task completion time for another person, we tend to be pessimistic and *overestimate* the time needed.<sup>20</sup> A potential solution? Create your own estimates for the work you'll do, but validate them with someone you trust.

This bias is one of the many reasons professional project managers are assigned to manage projects. In addition to coordinating the efforts of various parties, part of their role is to collaborate with others to determine realistic time estimates based on the average times of past projects.

In my own experience, I've seen many times employees provide time estimates to their superiors that are unrealistically optimistic. Later, work comes in behind schedule and the employee's superior is confused as to why a smart individual could be so poor at their own time estimation. These findings would suggest it's not the individual, it's human nature.

And so, for best results get an independent party you trust to weigh in on estimates received directly from those performing the work.

Ideally, this party should have knowledge of past similar work or projects to have appropriate averages to reference. If you're the one estimating time for yourself, then ask someone you trust, and again someone who has done what you'd like to accomplish. For example: a project manager, a trusted friend or colleague, an industry expert, or simply someone you know with

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<sup>20</sup> Buehler, R, Griffin, D, Ross, M. *It's about time: Optimistic predictions in work and love*. European review of Social Psychology, Volume 6. Issue 1. 1995. pp. 1-32.  
<http://www.tandfonline.com/doi/abs/10.1080/14792779343000112>.

significant experience in the area you're pursuing.

If what you're doing has never been done before (e.g. a trip to Mars) then break the work down into components that have, and estimate these using similar situations where appropriate. For example, for a trip to Mars use existing time estimates for space launch, reaching outer orbit, space travel per mile travelled, etc.

Even the most innovative projects have components that relate to past work. Where there is greater uncertainty or risk, i.e. landing on Mars may not go as smoothly as landing on the Moon, then add a buffer to your time estimate.

While most of us are not planning a Mars landing, we're planning re-organizations of our divisions, renovations for our home, and new product launches. These activities may be new for us, but they're not new for others. In cases like these, the above strategies can apply.

And now, for the challenge:

**Curb Your Enthusiasm:** for 10 *Productivity Points*, think of any goal you've set for yourself. This could be a career goal, a short-term project goal, or a personal goal. Ask yourself: who can I consult with on my timeframe to see if it's realistic? Who else has done what I'm trying to do many times over, or at least more times than I have?

Once you've identified this person, schedule in ten minutes in your calendar to send them a message and get their opinion.

The purpose of this challenge is to get us into the habit of

checking with others, and reliable sources, when we set a timeframe in which to achieve a goal. The reason for this is not because we're not capable. It's because our planning bias is always there, and it's hard to overcome alone. By getting estimates from those that have done what we'd like to do, we'll finish our work on time more often, giving us potentially more resources from those we serve and greater motivation to achieve our larger goals.

### **Long-term vs. Short-term Planning**

What's a greater predictor of success in realizing your long-term goals? The amount of short-term planning you do, or the amount of long-term planning? It turns out from a study at the University of Georgia, that, as you might expect, both are important. But, it's short-term planning that is almost *two times more predictive* of success.<sup>21</sup>

Consider, have you ever seen your organization's best laid annual or quarterly plans get dashed away by the subsequent commitments made by management and staff in the months that follow? Between the time these plans were made and now, priorities may have changed, staff may have come and gone, and stakeholders may have changed their minds on what they want to achieve.

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<sup>21</sup> Britton, B K, Tesser, A. *Effects of time-management practices on college grades*. Journal of educational psychology. Volume 83. Issue 3. 1991. p. 405.  
<https://www.researchgate.net/publication/232573913>.



In contrast, when planning out each day, at the beginning of each day, you can adapt more easily to setbacks and changes.

While short-term planning may be more predictive of success than long-term planning, having both short-term *and* long-term plans is the best way to ensure you commit to your daily targets but don't lose sight of your long-term goals.

A useful way to do this is what I refer to as *The Three-Point Day Plan*. The technique works as follows:

### **Step 1: Identify the #1 task**

At the beginning of your workday, or the evening before, take out your notebook and identify the number one task you need to accomplish for the day. Schedule it for a specific time, and plan for any distractions.

Preferably, this time slot should coincide with your highest energy period of the day. As we've seen, this tends to be early in the morning when our willpower is also at its highest. While some of us are most energized right after we jump out of bed, others are at their peak right after a morning coffee, or immediately after a mid-morning run. Pick whatever time works best for you.

When planning for distractions, pick the appropriate environment. This may mean working on your number one task in a private room, a coffee shop where you can be anonymous, or simply working at your desk but turning off your work phone or e-mail for a temporary period.

## **Step 2: Schedule in remaining actions**

Once your number one task has been scheduled, schedule in the remaining actions and events that you want to accomplish for the day.

Don't put down on your list everything you need to do this week or month, *only what you feel you can accomplish by the end of the day*. You want to avoid the stress and procrastination that can occur when you feel overwhelmed with more work than you could realistically accomplish in a single day. If you do finish all of your planned items, you can always add more from your master list later.

## **Step 3: Review your goals and adjust as needed**

Once all your commitments and urgencies have been scheduled for the day, review your long-term goals and priorities to ensure what you're doing supports them.

We regularly need to remind ourselves of what we're aiming for as it's so easy to get off track with the urgencies of life. For example, you may end up having multiple #1 tasks that have nothing to do with your long-term goals.

If you're not supporting one or more of your long-term goals, adjust your daily actions accordingly. It's not necessary to support all of your long-term goals every day of the week, but you want to ensure when you don't support a particular goal it's because of a conscious decision.

While you may be tempted to perform Step 3 on a less

frequent basis (i.e. weekly, monthly) it's identified here so that you can quickly adjust when life gets in the way of your plans. This is where the magic comes in, as you ensure your daily actions are bringing you closer to your long-term goals. Also, daily actions encourage strong habits.

**The Three-Point Day Plan:** for 10 *Productivity Points*, take ten minutes, or schedule in ten minutes later today to make a three-point day plan for tomorrow.

Also, make a reminder in your calendar to review it first thing tomorrow, or when you arrive at work. At the end of tomorrow, reflect on whether you accomplished more, felt more satisfied with your day, and felt more productive in the process.

The purpose of this challenge is to leverage what we know about the power of short-term planning in helping us to achieve our long-term goals. As we'll see in a later chapter, it also supports the concept of habit formation as a means of making these types of planning efforts more effortless and routine.

### **Guard Your Commitments**

Have you ever felt that even if you planned out your day, you'd still get pushed off track by all of the distractions, mounting low-importance work, and urgencies to address? It turns out you might be suffering from a lack of perceived time control.

In a joint study at the Universities of Missouri, Hofstra and Rice, it was identified that in an assessment of four unique factors affecting success in work completion, *perceived control*

of time was most effective.<sup>22</sup> Specifically, high degrees of perceived control were associated with significantly greater perceived work performance, reduced role ambiguity, reduced stress, fewer feelings of overwhelm, and overall improved work and life satisfaction.

According to Professor Therese Hoff Macan of the University of Missouri-St. Louis, “Time management behaviors—goal setting and prioritizing and having a preference for organization—appear to have beneficial effects *if they give persons the perception that they have control over their time.*”<sup>23</sup> Thus, it’s not that using time management techniques will lead us to a sense of control over time, but rather that the sense of control enables us to effectively adopt and use these techniques.

For example, if we create a list of work to be done, but we do not also address other factors such as distractions and motivations, we may end up in a week’s time staring at a list of uncompleted actions.

In turn, if we do not address an inability to delegate our work, we may have highly scheduled activities and clear to-do’s but still feel completely overwhelmed.

It’s the perception of control that allows us to say ‘no’ to others, to value how our time is spent, and to not let others

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<sup>22</sup> Macan, Therese H; Shahani, Comila; Dipboye, Robert L; Phillips, Amanda P. *College students' time management: Correlations with academic performance and stress*. Journal of educational psychology. Volume 82. Issue 4. 1990. pp. 760-767. <https://www.researchgate.net/publication/209836182>.

<sup>23</sup> Ibid.

dictate how it should be spent without our conscious consideration of the implications. No day-planner or to-do list can do this alone.

How do you gain control of your time? Start first by guarding your commitments. To do this you need to not only schedule and plan your work, but also anticipate potential distractions. This is critical as others' requests, and even distractions we inflict on ourselves, can easily push us off track. When guarding your commitments, consider the following strategies:

### **1: Book your time**

If you have something you need to get done, like a critical report or client product, don't leave it to chance. Book off the time you'll need in your calendar. Book a meeting or private room or go to a nearby coffee shop where you won't be interrupted.

During this time, you don't want to hope you don't get interrupted. You want to set yourself up so that it's *not possible*. If you can't leave your desk, or maybe you work at home with kids, then temporarily turn off your work phone, close your e-mail program, and turn off social media. Make this time sacred.

### **2: Say 'no' more often**

This is easier said than done, as it's difficult to turn someone away who's taken the time to visit you at your desk, or to solicit your support via a personal phone call or message. That said, 'No' doesn't need to equate to 'Not ever'. Assuming someone

has made a legitimate request, consider the following script the next time you need to say ‘No’:

“Oh, hey [John], do you mind if I get back to you at [11]? I just need to finish this [report] for [the Director’s table]. Is that ok?”

Most of the time this message will be acceptable to others as it acknowledges you’ll get back to them later in the day and it tells them why you’re not available.

This is much more respectful, and often more effective, than simply saying, ‘No’ or ‘Sorry, I can’t right now.’ This is particularly useful if someone is requesting your support in-person.

### **3: When saying ‘no’ is hard to do, enlist help**

In more extreme cases, when saying ‘No’ is too difficult, perhaps because the requester is demanding, you may want to enlist help.

You can do this by asking your superior to filter requests, or if you’re a leader or entrepreneur, you can ask a colleague or virtual assistant. Here’s an example script you can try:

“Oh, hey [John], would you mind if I get back to you? I just need to finish this [report] for [the Director’s table]. Just send your info to [Sam] and he’ll setup a time when we can chat. [Sam] has graciously offered to help me out with my schedule so for any future needs you can just ask him and he’ll get back to you quickly.”

The key here is that you can quickly shift others’ requests to more appropriate times of the day or week.

#### 4: Hold an ‘open door’ policy

If you have multiple ‘low value’ but necessary requests, you can try to group these into a single time-slot. By doing so, you avoid the situation where you have multiple interruptions throughout the day that take you out of your flow and make you less productive. An example script is as follows:

“Oh, hey [John], would you mind if I get back to you? I just need to finish this [report] for [the Director’s table]. I’m available [Friday afternoon] if this works. Just drop by my office then [or, give me a call; or send me a message, etc.] and we can chat.”

#### 5: Clear off your plate

Once you’ve reduced or eliminated the chance of distractions from others, you’ll want to think about how you can clear your plate of any non-priority requests that may be grabbing at your attention. To do this, follow the approach of *defer*, *delegate*, and *delete*.

For *defer*, ask yourself: can you defer the non-priority task to a time of the week that is less busy, when you have less energy, or when you will have completed your higher-priority items? Alternatively, can you ask that the requester contact you the following week?

For *delegate*, ask yourself: can you delegate the task of filtering your requests to a third-party, such as an assistant, a more junior colleague, or a system? While you’re at it, can you

train the assistant to do some of the work for you? By doing so, they gain challenging work and you gain more time. When doing this, just be sure the work you assign is appropriate for their position and in alignment with their interests.

For *delete*, if a request is not worth deferring, or even delegating to someone else, just delete (or ignore) it and move on. Some examples include unsolicited sales calls and offers to optionally attend certain meetings. Life is too short to respond to everything, so hit that delete key often and don't look back!

**Guard Your Commitments:** for 10 *Productivity Points*, schedule in ten minutes this week to think about and implement one or more of the previous time guarding strategies to ensure you have the uninterrupted time you need to complete your important work. These include: booking your time, identifying what you'll say when you need to say 'no', enlisting help to filter requests, holding 'open door' periods, and clearing your plate by deferring, delegating, and deleting.

The purpose of this challenge is to help us practice the art of navigating distractions caused by others and ourselves.

The next time you need to say 'No,' remember the words of Warren Buffett: "The difference between successful people and very successful people is that very successful people say no to *almost everything*."<sup>24</sup> Say no often, say no respectfully, and keep going.

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<sup>24</sup> BBC. *Why Saying No Will Boost Your Career*. March 14, 2014.  
<http://www.bbc.com/capital/story/20140314-just-say-no>.



## **Never Write Down an Idea or Task Twice**

Assuming you're guarding and grouping your time, and assuming you're diligently deferring, delegating, and deleting, there is still one more thing that can take you out of your sense of control: *forgetfulness*.

Have you ever had a great idea for improving your life or business, but had nowhere to write it down? Maybe you were in the shower, or you went on a walk without bringing your smartphone. As a result, you try to repeat your idea in your head hoping you don't forget.

If you've ever experienced this phenomenon, or simply forgotten something someone's told you, you know first-hand the classic limitation to the human mind: limited short-term memory.

Despite our best efforts, our minds can only hold so much information, and the results from this can be disastrous. If you haven't already, at some point in your career you're going to receive an important request, or be asked to attend an important meeting, and you'll completely forget about it in your busyness, leaving frustrated colleagues and clients in the wake. And let's not forget the disasters that can occur when we forget family engagements.

The fact is, our minds can imagine incredibly vivid future scenarios and can bring together disparate ideas into completely new creations, but we're terrible at *storing* information beyond seven separate items, plus or minus two.

This finding is so well cited in psychology literature, it's commonly referred to as *Miller's Law*.<sup>25</sup>

The antidote is to admit that we're not supercomputers and to leave the remembering to the tools around us, whether they be paper-based or digital. Your smartphone and laptop may not be able to beat you in a brainstorming session, yet, but they can store exponentially more information in short-term memory and still have room to spare.

Given the known limitations of our short-term memory, it's imperative that if we want to be the most productive, at work and at home, then we need a task and idea management system that is robust, flexible, and travels with us wherever we go.

If you don't already have such a system, or if you'd like to make the one you have even better, then review the following actions to define one you'll love to use.

## **1: Define the location**

Decide on, and setup where you'll record your ideas, to-do's, projects, and other action lists. When doing this, avoid too many storage locations. In other words, try not to have separate to-do lists around the office or house.

With too many locations you'll get confused as to what list is

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<sup>25</sup> Miller, George A. *The magical number seven, plus or minus two: some limits on our capacity for processing information*. Psychological Review. Volume 63. Issue 2. 1956. p. 81.  
<http://psychclassics.yorku.ca/Miller/>.

accurate or comprehensive. As a result, you'll end up reverting back to juggling all your to-dos and commitments in your head.

Personally, I prefer using a digital location. A lot of great Web-based services allow you to write down tasks on your smartphone and have them automatically synced with your laptop or desktop computer via the cloud. In this case, the cloud (a computer out on the Web) is the location of your data, and all your electronic devices read the data from this single location.

Alternatively, if you choose to use a paper notebook, then the location is wherever you place your notebook, which is hopefully somewhere you can access at all times.

The best tool, whether paper and pen, or something more digital, is whatever you enjoy using the most. I'll be the first to admit there are some pretty cool paper-based notebooks these days. The key is that you want your system to be accessible so that you're never left stranded when a good idea strikes.

## **2: Define your categories and priorities**

Without categories, you'll have one massive, unwieldy list of things to do, shower thoughts, grocery store items, project ideas, etc. In other words, a mess. And we all know what happens with messes. We hide them, ignore them, and eventually start over.

Without priorities, you won't know what should be tackled first, and by when. You may get overwhelmed with everything you need to do, and the high priority items might get lost in the

weeds if they're not easily identified. And when we don't know what to do first, we tend to move on to some other more easily defined task.

So, you want to pick a task categorization or prioritization system that works for you, and then stick with it to maintain consistency and clarity.

When picking your priorities, keep them simple and personally meaningful. For example, you may simply wish to use A, B, and C, where each priority means something very specific. That said, be careful not to base priorities solely on what's most urgent as you can have many urgent tasks that are not important. It's better to find a balance between tasks that are both *urgent and important*, and those that are both *non-urgent and important*.

While knowing what's urgent is fairly straightforward, knowing what's important is more subtle. If an urgent task does not get accomplished on time, bad things tend to happen. If a task you deem as important does not get accomplished, there may be no immediate consequences. So, what is an *important* task?

This is the million-dollar question.

Consider the 80/20 Principle. According to Richard Koch, author of the classic *The 80/20 Principle*: "...We only make good use of 20 per cent of our time. And for the most talented individuals, it is often tiny amounts of time that make all the

*difference.*"<sup>26</sup>

Practically speaking, if you could just double the amount of time you focused on your top 20% activities, you could significantly reduce the amount of time you need to work to get the same (or better) results. If you continued to work the same number of hours, your productivity would increase substantially.

This is the kind of thinking that can bring us closer to a *4-Hour Work Week*. But even if we prefer to work the number of hours we do, we can be immensely more productive in those hours by *focusing as much as possible on the 20% of activities that bring the most value to the organization, the 20% that use our skills and talents to the fullest, and the 20% that bring the most value to our clients.*

Once you've identified that 20%, prioritize any task or project that fits into it above all else. If two high-value activities come along that are both in your 20% bucket, prioritize the one with the greatest impact in all three areas.

To understand what provides the greatest impact, you need to be clear on (a) your organization's vision and mandate, (b) your skills, and (c) your clients' preferences. Once you know these factors well, the key is to do more of the tasks that best support all three.

When performing a given task matches your skills but not your vision (or your company's vision) you don't move your life

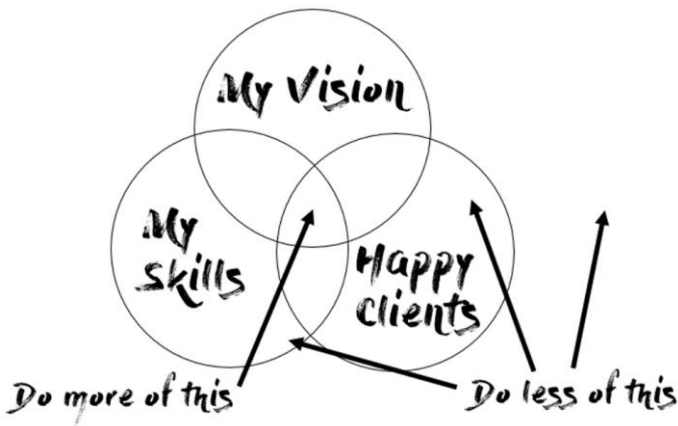
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<sup>26</sup> Koch, R. *The 80/20 principle: The secret to success by achieving more with less*. 1999. Crown Business.

(or the organization) forward.

When performing a given task matches your skills but doesn't fulfill client preferences, no one will pay you well for what you do. And when performing a given task matches the vision but not your skills, you can become stuck performing work that isn't fully suited to who you are and your talents.

The place you want to be, as much as possible, is in the middle. That middle is your 'important work.' You want to ideally do more of this, and less of everything else. Doing more of what you consider *important* is at the very core of being highly productive.



**Identifying Your 20%:** for 10 *Productivity Points*, take ten minutes now, or schedule in ten minutes, to answer the following questions:

1. What does my organization want to achieve, primarily, above all else, in the next five to ten years? If this is too broad, ask

yourself: how does my CEO want the organization to change the world, to make it a better place, or to delight its customers?

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2. What *group of skills* have I developed in my academic or professional career, that not only pay the bills (or could pay the bills) but also are ones that I truly enjoy using and developing?

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3. What types of activities and projects make my customers or clients *most* happy? Which activities delight them, and lead them to want to deal with me more often, and in more ways?

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After you've answered these questions, take a moment to reflect on where your responses overlap. This intersection is what you should consider your most important work.

### **Categorization:**

Once you know how you'll prioritize your tasks, you'll want to

define how you would like them to be categorized. The purpose of categorization, or grouping, is to (a) make your tasks more meaningful and actionable and (b), help you avoid the sensation of overwhelm that can come when reviewing a single, giant list. Categorizations you may wish to consider include:

- By project (e.g. all tasks for Project X, Project Y, etc.)
- By date you'll act on it, or complete it
- By context (e.g. all tasks to do at your home, office, etc.)
- By life category (e.g. health, career, family, relationships)
- By personal priority (e.g. losing weight, sales of product X, etc.)
- By time of day (e.g. early morning, late afternoon, etc.)
- By person who will help you (e.g. Jack, Mary, Tom, etc.)
- By amount of work required (e.g. 10-30 mins, 30-60 mins, 60+)
- By amount of attention and energy required (e.g. low, high, etc.)

**Build Your System:** for 20 *Productivity Points*, take twenty minutes or schedule in twenty minutes this week to decide on, and setup, where you'll record your ideas, to-do's, projects, and other action lists.

If you already have such a system in place, take this time to review it to see if there are any areas where it could be improved based on what we've discussed. In summary:

- Priority levels should be personally meaningful.



- The categories you choose should help you to focus on the single portion of your task list that is relevant to you at the moment.
- Try to avoid basing priorities solely on what's most urgent. Rather, focus more on what's important and urgent, as well as what's important and non-urgent.
- Use the 80/20 principle to identify what's uniquely important to you.

By building (or refining) your system, you'll have peace of mind that any creative ideas you generate won't be forgotten. Further, you'll know what you need to do *first* for any given area of your life. And finally, you'll be able to more consistently and effectively honor commitments you've made to others and yourself.

# 4

## Productive Learning

*“The value of an education ... is not the learning of many facts but the training of the mind to think ...”*

- Albert Einstein, theoretical physicist and world-renowned genius

### Metacognition and Active Learning

A funny thing happened in my high school Calculus class. In studying for one of the many exams, something I previously felt was challenging, I realized that I was finally ‘getting it’, and faster than before. I knew this was unusual from past test results, and also because something *felt* different.

Just before this all occurred, I had bought a four-color pen. Yes, nerdy, I know. But when I started using it, I got into the habit of writing easy concepts in blue, moderately easy concepts in

black, difficult concepts in red, and comments about the information in green. At first, I did this just to take myself out of the monotony of studying abstract mathematical formulas and concepts.

As I did this however, something clicked in my mind. It was all making more sense. In reviews of my notes, which were now faster, I could focus first on the black and red text, then spend any remaining time on the blue text. Also, I could see over time if the comments in my head differed from my previous notes in green.

I found they did, and eventually the green notes didn't need to be studied. They were part of my learned knowledge. As a result of this change to my learning approach, to my complete bewilderment, any test that involved the acquisition of facts and concepts became easier.

What I now realize is that at the time I had stumbled across what the scientific literature calls *metacognition*, or thinking about our own unique thinking. I had become more aware of how I was learning, as well as what worked and what didn't.

As noted by Dr. John Flavell of Stanford, "*Metacognition plays an important role in oral communication of information, oral persuasion, oral comprehension, reading comprehension, writing, language acquisition, attention, memory, problem*

*solving, social cognition, and, various types of self-control and self-instruction.*”<sup>27</sup>

According to Flavell, experiencing metacognition is not the stuff of genius. In fact, we all experience it, to varying degrees, all the time.

Consider when someone tells you something and you realize in your distracted state you recalled nothing at all. This type of self-reflection is in many ways natural and it helps us to improve our retention and learning.

The trick is that, as with many cognitive processes, we can take these insights as they come, or we can be more deliberate about understanding how we think and learn.

In a study on the application of metacognition by Barbara White of the University of California at Berkeley, it was observed that *inquiry and reflective assessment*, a practice in which participants ask probing questions about concepts and then reflect on each other’s inquiry, greatly facilitated a participant’s learning.<sup>28</sup>

To apply inquiry and reflective assessment, participants were asked to perform three key tasks:

## 1. Formulate a question regarding the information you’re

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<sup>27</sup> Flavell, John H. *Metacognition and cognitive monitoring: A new area of cognitive–developmental inquiry*. *American Psychologist*. Volume 34. Issue 10. 1979. p. 906. [http://www4.ncsu.edu/~jlnietfe/Metacog\\_Articles\\_files/Flavell%20\(1979\).pdf](http://www4.ncsu.edu/~jlnietfe/Metacog_Articles_files/Flavell%20(1979).pdf).

<sup>28</sup> White, Barbara Y; Frederiksen, John R. *Inquiry, modeling, and metacognition: Making science accessible to all students*. *Cognition and Instruction*. Volume 16. Issue 1. 1998. pp. 3-118. <https://www.researchgate.net/publication/247502531>.

learning.

2. Answer that question by putting your knowledge to use.
3. Apply one's findings to different situations.

A key point to the approach is that you're not just taking notes on what you've heard, but rather you're applying the knowledge to a problem that's meaningful to you, and you're learning about what works and what doesn't when the knowledge is applied.

Third century B.C.E. philosopher Xun Kuang (or Xunxi) said it well: *"Not having heard something is not as good as having heard it; having heard it is not as good as having seen it; having seen it is not as good as knowing it; knowing it is not as good as putting it into practice."*<sup>29</sup>

Similarly, sixth century B.C.E. philosopher Lao-Tzu (Laozi) explained: *"If you tell me, I will listen. If you show me, I will see. But if you let me experience, I will learn."*<sup>30</sup>

Although these proverbs are centuries old, active learning techniques such as inquiry and reflective assessment show that they still ring true today. In a study by Richard Hake of the University of Indiana, it was observed that in comparison with traditional learning approaches, methods that involved students being hands-on with learning activities that yielded immediate feedback were *significantly* more effective. In examining the learning behavior of over 6,000 participants in 62

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<sup>29</sup> Lee, Janghee. *Xunzi and Early Chinese Naturalism*. 2005. SUNY Press.

<sup>30</sup> Silberman, Melvin L, Hansburg, Freda. *People smart: Developing your interpersonal intelligence*. 2000. p. viii. Berrett-Koehler Publishers.

courses it was shown that active learning and interactive engagement techniques improved knowledge retention in post-course tests by an average of 48%.<sup>31</sup>

In a similar study on class instruction by Chance Hoellwarth and Matthew Moelter of California Polytechnic State University, it was shown that in comparison with traditional teaching methods, active learning methods produced improvements in participant learning between 12 to 50%.<sup>32</sup>

Given the clear benefits of active learning, consider the following methods for your next personal and professional development activity:

**Peer Instruction**<sup>33</sup>: Take a concept you've just read, or heard in a video or podcast, and explain it in your own words to a colleague, spouse, or friend.

For example, when learning a new concept in personal finance, I like to discuss it with my wife to see if I can explain it in a way that makes sense to myself and to others. In the process, I learn, she learns (or she humors me!) and we both increase our retention of the concept. If the topic you're

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<sup>31</sup> Ibid.

<sup>32</sup> Hoellwarth, Chance; Moelter, Matthew J. *The implications of a robust curriculum in introductory mechanics*. American Journal of Physics. Volume 79. Issue 5. 2011. pp. 540-545. [http://digitalcommons.calpoly.edu/cgi/viewcontent.cgi?article=1332&context=phy\\_fac](http://digitalcommons.calpoly.edu/cgi/viewcontent.cgi?article=1332&context=phy_fac).

<sup>33</sup> Crouch, Catherine H; Mazur, Eric. *Peer instruction: Ten years of experience and results*. American Journal of Physics. Volume 69. Issue 9. 2001. pp. 970-977. [https://www.usna.edu/Users/physics/rwilson/\\_files/documents/peer.pdf](https://www.usna.edu/Users/physics/rwilson/_files/documents/peer.pdf).

learning is relevant to your occupation, your colleagues may have a receptive ear, particularly if they perform similar work.

**Cooperative Problem Solving<sup>34</sup>:** Pick a problem that's been bothering you at work or at home and solve it with your spouse, friend, or colleague using a concept you're trying to learn.

For example, say you're trying to learn leadership skills for work. Instead of solely watching videos or taking an online course, you could identify, discretely, a specific leadership problem you've seen in the organization with your manager and then work with them in a few one-on-one sessions to discuss how you would suggest ways to improve the situation for the leader and the organization.

**Modeling<sup>35</sup>:** Seek out models, diagrams, and figures from reputable sources that illustrate how many of the concepts you're learning fit together and operate.

Once you understand how a model works, you can test its validity using real-life problems, and develop refinements to encapsulate your findings. These activities actively engage you with the content you desire to retain and build multiple neural connections between otherwise disparate concepts. For example, the learning of project management is significantly

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<sup>34</sup> Heller, Patricia; Heller, Kenneth. *Cooperative group problem solving in physics*. 2001. Brooks/Cole Publishing Company.

<sup>35</sup> Jackson, Jane; Dukerich; Larry; Hestenes, David. *Modeling instruction: An effective model for science education*. Science Educator. Volume 17. Issue 1. 2008. p. 10. <http://files.eric.ed.gov/fulltext/EJ851867.pdf>.

easier when you study the integrated planning model as presented by the Project Management Institute. This model presents in visual form numerous concepts such as communications, planning, and execution, and shows how they interact in an integrated system. The result: faster, more productive learning.

**Get Meta with Your Cognition:** for 20 *Productivity Points*, take twenty minutes or schedule in twenty minutes this week to think about an upcoming training event for work, or a training activity for personal or career development. As part of the challenge, answer the following four questions:

1. How do I learn best? What works for me? What doesn't?

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2. How can I apply what I'm learning (or will learn) with a problem at work or in life with a colleague or friend?

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3. How can I share what I'm learning (or will learn) with others?

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By better understanding how you learn, and what works best, you'll be making the most of the precious minutes and hours you devote to your learning for personal and professional development. You'll also be increasing your chances of putting your newly learned knowledge to practical use.

### **Memory and the Method of Loci**

The *Method of Loci* has, regrettably, nothing to do with Loki, the infamous adoptive brother of Thor in Norse Mythology. The concept is older still, introduced by the Greek poet Simonides and written into history by the Roman philosopher Cicero in the first century B.C.E.

According to Cicero's story, Simonides was called outside after a performance, where during his absence the roof of the banquet hall he was attending collapsed, instantly crushing everyone inside.

Simonides was able to identify the bodies for a proper burial

by referencing his visual memory of the people sitting around the banquet table. Cicero writes:

*“[Simonides] inferred that persons desiring to train this faculty [of memory] must select places and form mental images of the things they wish to remember and store those images in the places, so that the order of the places will preserve the order of the things, and the images of the things will denote the things themselves, and we shall employ the places and images respectively as a wax writing-tablet and the letters written on it.”*

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A few hundred years later, in a study out of UCL, researchers examined the MRI brain scans of the world’s best memorizers, those of the World Memory Championships. They found that these ‘super memorizers’ displayed a high degree of activity in the right hippocampus, an area involved in spatial visualization. Furthermore, *90% of the super memorizers used the Method of Loci for some or all of their tasks. The researchers concluded that “The longevity and success of the method of loci in particular may point to a natural human proclivity to use spatial context—and its instantiation in the right hippocampus—as one of the most effective means to learn and recall information.”*<sup>37</sup>

In the context of being more productive, if you need to

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<sup>36</sup> Stanford University. *Ancient Imagery Mnemonics*. Stanford Encyclopedia of Philosophy. Cicero, De Oratore, II, LXXXVI. 1942. Sutton & Rackham. <https://plato.stanford.edu/entries/mental-imagery/ancient-imagery-mnemonics.html>.

<sup>37</sup> Maguire, Eleanor A; Valentine, Elizabeth R; Wilding, John M; Kapur, Narinder. *Routes to remembering: the brains behind superior memory*. Nature Neuroscience. Volume 6. Issue 1. 2003. pp. 90-95. <https://www.researchgate.net/publication/10990317>.

commit a speech, pitch, or presentation to memory, then the *Method of Loci* may just be your secret weapon.

**The Method of Loci:** for 20 *Productivity Points*, take twenty minutes, or schedule in twenty minutes this week, to pick a speech, pitch, presentation, joke, or anecdotal story you'd like to have on hand to share with others from memory. Then, try the *Method of Loci* to see how rapidly you can commit the content to memory.

This technique is a lot of fun, and works well, so I hope you give it a try. Here are some tips:

- Pick a location that you know intimately well. For example, your kitchen, bedroom, or living room.
- Chunk the content you want to commit to memory into sequential bits, and peg each bit of content to a location with a memorable or funny story.
- Practice telling your story, pulling up each piece of content (or location in your scene) from memory.

The potential applications of the *Method of Loci*, are nearly limitless, from more quickly establishing rapport with your clients through the re-telling of powerful anecdotes from memory, to more naturally delivering presentations that get clients or colleagues to commit to your next big product or idea. And, of course, no one will be the wiser that you're pegging parts of your story to your kitchen knives and blender.

# 5

## Productive Problem Solving and Decision Making

*“It's not hard to make decisions when you  
know what your values are.”*

- Roy Disney, son of Walt Disney and longtime senior executive  
of the Walt Disney Company

### Simplifying Tough Decisions

**W**hen choosing your career path, do you take the high-paying job with more stress or the low-paying job with less stress?

As a leader, do you hire the star candidate for a higher salary, or the less-experienced candidate with potential for a lower

salary?

Do you allow staff to have more decision-making authority for greater efficiency, but also greater risk of error, or do you keep this authority and remain with less risk of error but also less opportunity for efficiency?

These types of decisions, and many more, deserve more than a snap response. Though deciding based on our gut is fast and often convenient, it's not always productive, and here's why:

1. Our feelings on a decision are often filled with unconscious biases that may be counterproductive, such as making decisions based on prejudices, in-group bias, halo effect, etc.
2. Group decisions based on consensus sentiment are easily subject to group-think.
3. What feels right now might not feel right tomorrow, as our sentiments are heavily influenced by present situations and environment.

Nobel prize-winning psychologist Daniel Kahneman summarizes our decisions well in his work *Thinking, Fast and Slow*, when he concludes of 'fast' (or gut feeling) thinking, "*this is the essence of intuitive heuristics: when faced with a difficult question, we often answer an easier one instead, usually without noticing the substitution.*"<sup>38</sup>

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<sup>38</sup> Kahneman, Daniel; *Thinking, fast and slow*. 2011. Farrar, Straus and Giroux.

So, when we need to make tough, complex decisions, how can we be the most productive with our time?

In times like these, and in all cases where the decision truly matters, *consider what you value*. Practically speaking:

1. Identify the specific factors of the ideal scenario or choice that matter most to you.
2. Identify, for each factor, the degree to which it matters to you.

For example, for buying a car, the specific factors you might be looking for in your ideal choice are high performance, good looks, good fuel economy, and low price. You might then say that ‘fuel economy’ is more important than ‘looks’, giving ‘fuel economy’ a score of 8 out of 10, and ‘looks’ a score of 6 out of 10.

3. For each option, assign a score from 1 to 10 for each factor.

For example, for Car A, you might like the way it looks, so you give it a score of 8 in the ‘looks’ category. For Car B, it’s not that great looking, so you give it a score of 4 in the ‘looks’ category.

Do this for all options and factors. At the end, multiply each factor’s weighting by the score you gave each option.

Once you’ve added up the scores for each option, the option with the highest score is the best option.

Option	Performance (5)	Looks (6)	Fuel Econ. (8)	Low Price (5)	Score
Car A	7	8	9	3	170
Car B	9	4	8	6	163

Is it worth the time it takes to use the multi-attribute (MA) method? In a study jointly run from Tel-Aviv University and the London School of Economics, including 60 participants making decisions with and without MA training, they found that MA decision making did indeed provide for more effective decisions.<sup>39</sup>

Given this, do gut-feeling decisions hold any value? What if our intuition tells us to *not* pick the calculated best option? This brings up a fair question: is intuition (or gut feeling) on par with a calculated result for decision effectiveness?

In a study by John Child of the University of Birmingham and his colleague Said Elbanna of UAE University, they found through an analysis of multiple companies addressing 117 *strategic decisions*, that when it comes to decisions faced by organizations, rational decision-making is “... a *significant predictor of strategic decision effectiveness; while intuition is not...*”<sup>40</sup>

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<sup>39</sup> Zakay, Dan; Wooler, Stuart. *Time pressure, training and decision effectiveness*. Journal of Ergonomics. Volume 27. Issue 3. 1984. pp. 273-284.  
<http://dx.doi.org/10.1080/00140138408963489>.

<sup>40</sup> Elbanna, Said; Child, John. *Influences on Strategic Decision Effectiveness: Development and Test Of An Integrative Model*. Strategic Management Journal. Volume 28. 2007. pp. 441-445. <https://www.researchgate.net/publication/227538317>.

This result did not imply that intuition played no role, however it was a much lower predictor of effectiveness. In fact, as decisions relied *more* on intuition, decision effectiveness *decreased*.

Further, researchers found that rational decision-making approaches were *more* effective when dealing with decisions with a high degree of uncertainty, in comparison with low-uncertainty decisions.<sup>41</sup> This implies that when available information is less clear, it's even more important to rely less on your gut and more on rational analysis with whatever information is available.

And working with the data available is key. In a study of 223 IT executives, it was found that, though it often took more time, those that systematically collected and analyzed information made more effective decisions than those that based their decisions on gut-feeling or snap assessments.<sup>42</sup>

The good news is that although the MA method looks like a lot of work, it actually *saves* time. Specifically:

1. Identifying the factors that matter to you is typically much clearer than identifying which option you prefer.
2. As a group, you arrive on the same page sooner regarding

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<sup>41</sup> Ibid.

<sup>42</sup> Ranganathan, C; Sethi, Vijay. *Assessing the Impact of Decision Process on Effectiveness of Strategic IT Decisions: A Triangulation Approach*. ICIS 2000 Proceedings. Volume 43. 2000. p. 456. <http://aisel.aisnet.org/icis2000/43/>.



what matters most, making the actual decision easier to justify to others.

3. It's flexible enough to handle any level of complexity in your decision as it breaks it down into its core components.

4. The result will be a better decision, meaning less risk of re-work, cancelling bad projects, or re-allocation of resources. For personal decisions, this means less wasted time going down an avenue that was not the best choice given your values.

**Simplify Your Tough Decisions:** for 10 *Productivity Points*, decide on a complex decision you need to make this month, and book a time over the next week to try out the MA method.

This challenge will help you to not only make complex decisions more quickly, but it will also help clarify *what you value most*. These insights can help you to more quickly make other related decisions.

When practicing the MA method as a group, you can ensure you receive better buy-in by clarifying from the beginning what factors are most valued to the team before embarking on a potentially risky option. Regardless of the level of complexity, or number of factors to consider, the MA method can scale to meet your challenge.

## **Better Group Decisions**

Have you ever been in a situation where a superior has asked

everyone to hole up in a boardroom until a solution has been reached?

Do you remember the long hours of deliberation? The exhaustion?

It turns out this is a woefully unproductive way of getting group work done. And yet, we see it all too often when crises or deadlines strike.

In two separate studies out of the University of Wisconsin, it was identified that in comparison with the ‘all hands on deck’ (traditional) approach, both the Nominal<sup>43</sup> and Delphi<sup>44</sup> (alternative) methods produced superior results.

In a separate study at the University of Southampton, it was concluded that the Delphi method, in particular, was highly effective in addressing situations with “*a lack of agreement or incomplete state of knowledge...*”<sup>45</sup> In other words, many tough decisions we face today.

Here’s how the alternative methods work:

## 1. Avoid holding long meetings where staff deliberate everything

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<sup>43</sup> Van De Ven, Andrew; Delbecq, André L. *Nominal Versus Interacting Group Processes for Committee Decision-Making Effectiveness*. Journal of the Academy of Management. Volume 14. Issue 2. June 1971. pp. 203-212. <http://amj.aom.org/content/14/2/203.short>.

<sup>44</sup> Van De Ven, Andrew; Delbecq, André L. *The Effectiveness of Nominal, Delphi, and Interacting Group Decision Making Processes*. Journal of the Academy of Management. Volume 17. Issue 4. December 1974. pp. 605-621. <http://www.jstor.org/stable/255641>.

<sup>45</sup> Powell, Catherine. *The Delphi technique: myths and realities*. Journal of advanced nursing. Volume 41. Issue 4. 2003. p. 376. <http://onlinelibrary.wiley.com/doi/10.1046/j.1365-2648.2003.02537.x/full>.

until consensus is reached, a problem is identified, or a solution is developed. Instead, have someone explain the situation or context to the group, provide the group with any existing data, and then send members off to individually reflect on the problem, asking themselves ‘Why?’ questions to address root causes and ‘What if?’ questions to consider possible solutions.

2. After a set period of time, reconvene, either physically to a room or virtually via an online meeting. Each member presents their findings and the group collectively agrees on the root cause and proposed solutions based on the facts presented. If consensus is not reached, or more time is needed, members are sent back for more reflection, and then re-group.

Both the Nominal and Delphi methods follow the above-described process. The key difference is that while the Nominal method involves *physically* bringing people together, the Delphi method works when this is not practical, such as when you have clients or stakeholders in separate geographies.

In the Delphi method, named after the great Oracle of Delphi, a facilitator polls a group of experts (e.g. by sending a group e-mail) who individually and anonymously provide their advice to the facilitator. The facilitator then aggregates, summarizes, and distributes the information back to the group of experts. This process continues until a group consensus is reached on the problem, idea, or solution.

As for when groups convene to discuss their findings, encourage members to use *devil’s advocacy* and *dialectical*

*inquiry* to avoid group-think. Devil's advocacy is about questioning all assumptions, whereas dialectical inquiry is about arguing or proposing the opposing viewpoint on a topic. In a study out of the University of Houston, it was identified that both devil's advocacy and dialectical inquiry were *more effective* than consensus with respect to the quality of assumptions that were raised.<sup>46</sup>

As a final tip, ensure that all those involved in the decision have access to the raw data, not just the summarized data or visual charts. There may be a perception that certain stakeholders or senior leaders only need access to summary data, but research out of the University of Minnesota shows that better decisions are made when *everyone* has access to the raw data.<sup>47</sup> So ensure those data tables and spreadsheets are easily accessible to the full group, not just a select few.

**A Better Group Decision:** for 10 *Productivity Points*, decide on a problem that's been given to you and others to solve together. Book a time to try the Nominal or Delphi method. Also, try some of the group decision-making strategies we've discussed, such as devil's advocacy and dialectical inquiry. See if these

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<sup>46</sup> Lunenburg, Fred C. *Devil's Advocacy and Dialectical Inquiry: Antidotes to Groupthink*. International Journal of Scholarly Academic Intellectual Diversity. Volume 14. Issue 1. 2012. pp. 51-71. <http://www.nationalforum.com/Electronic%20Journal%20Volumes/Lunenburg,%20Fred%20C.%20Devil's%20Advocacy%20&%20Dialectical%20Inquiry%20IJSAD%20V14%20N1%202012.pdf>.

<sup>47</sup> Dickson, Gary W; DeSanctis, Gerardine. *Understanding the effectiveness of computer graphics for decision support: a cumulative experimental approach*. Journal on Communications of the ACM. Volume 29. Issue 1. January 1986. pp. 40-47. <http://dl.acm.org/citation.cfm?doid=5465.5469>.

strategies can speed the decision, reduce time in meetings, and produce a better result.

This challenge helps us to practice alternative methods that may not be familiar. Not only can the Nominal and Delphi methods save time, they can also reduce group-think by leveraging everyone's unique expertise, making for better decisions.

# 6

## Productive Goal Setting

*“Motivation is what gets you started. Habit is what keeps you going.”*

— Jim Ryun, Olympic silver medalist and U.S. congressman

### When Goal Setting is not Enough

Over 40 years of research by psychologists Gary Lantham of the Rotman School of Business and Edwin Locke of the University of Maryland indicates that by articulating a *specific* goal as opposed to one that is not, we can improve our performance on tasks by an average of 15%.<sup>48</sup> While this is an

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<sup>48</sup> Locke, E A; Lantham, G P. *Building a practically useful theory of goal setting and task motivation: A 35-year odyssey*. American Psychologist, Volume 57. Issue 9. 2002. pp. 705-717. <https://www.ncbi.nlm.nih.gov/pubmed/12237980>.

improvement over ambiguous hopes and dreams, it's perhaps not something that will make us wildly productive. But, what if there was a way we could increase our chances of successfully meeting our goals by as much as 300%?

The problem with simply setting specific goals, is that we are creatures of habit. Just ask the employee who regularly checks their e-mails multiple times per hour how easy it is to decide to check only twice a day. Or, the spouse who habitually works overtime on their own volition, how easy it is to decide to come home consistently at 6:00 pm.

While we're at it, ask me why I don't get to work on my life priorities at 8pm on a Thursday evening when nothing would feel better than binge-watching another episode of my favorite show on Netflix!

When setting goals, we discount the fact that others, let alone our future selves, are not always ready and willing to follow orders from our past selves.

We are so entrenched in our habits that for a new behavior to be forged, or even for an existing one to be modified, one piece of evidence suggests it takes 18 to 254 days, or an average of 66 days of sustained commitment to the goal.<sup>49</sup>

According to Phillippa Lally and her colleagues at UCL, after this period of sustained commitment, we reach the magic state of what researchers call *automaticity*, or acting in the way we

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<sup>49</sup> Lally, P; Van Jaarsveld, C H M; Potts, H W W; Wardle, J. *How are habits formed: Modelling habit formation in the real world*. European Journal of Social Psychology. Volume 40. 2010. pp. 998-1009. <http://onlinelibrary.wiley.com/doi/10.1002/ejsp.674/abstract>.

want without significant thought or conscious effort.

Even after the point of reaching automaticity, Phillippa and her colleagues note that new habits don't stop the old habits from existing, they simply become of greater influence on our actions. Moreover, the researchers found no evidence to suggest that men and women, young or old, acquired habits any differently.<sup>50</sup>

In short, we all have the chance of achieving our goals but we must confront our existing habits. So, how do we do this productively?

Peter Gollwitzer and Veronika Brandstaetter-Morawietz, professors of psychology at New York University and the University of Zurich respectively, posited that if we can apply our goals to specific *implementation intentions* we can improve the likelihood of their achievement.<sup>51</sup>

For example, “*when* I first wake up, *then* I'll slip on my running shoes and do a 10-minute jog around the neighbourhood before I wash up.”

Implementation intentions work given our shift from telling our prefrontal cortex ‘I want X’, which has ambiguous behavior changes, to ‘I want to do X whenever Y occurs’, which is much easier to execute, and remember in key deciding moments.

In fact, research from psychologist Heidi Grant Halvorson of

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<sup>50</sup> University College London. *How Long Does it Take to Form a Habit?* UCL Press. August 4, 2009. <https://www.ucl.ac.uk/news/news-articles/0908/09080401>.

<sup>51</sup> Gollwitzer, Peter M; Brandstätter, Veronika. *Implementation intentions and effective goal pursuit*. Journal of Personality and Social Psychology. Volume 73. Issue 1. July 1997. pp. 186-199. <http://psycnet.apa.org/?&fa=main.doiLanding&doi=10.1037/0022-3514.73.1.186>.



Columbia's Motivation Science Centre indicates in a review of over 200 studies that setting implementation intentions increases goal achievement as much as 300%.<sup>52</sup>

**Change Your Life:** for 20 *Productivity Points*, select an existing or create a new dream, vision, or goal for your career, business, or personal life. Take ten minutes to make it a SMART goal if you haven't already done so, i.e. specific, measurable, achievable, realistic, and time sensitive. Next, take another ten minutes to identify 1-3 supporting daily habits and 3-4 'when-then' intentions to prepare for how this goal will play out in specific behavioral changes.

This challenge helps us to stretch outside our comfort zone of solely establishing SMART goals. SMART goals are useful, but when we want to achieve our goals faster and with greater effectiveness, we should aim to apply the concepts of automaticity and implementation intentions to ensure we avoid getting 'caught up' with life and work.

Aristotle said it well: "... *For one swallow does not make a summer, nor does one day; and so too one day, or a short time, does not make a man blessed and happy.*"<sup>53</sup> The achievement of our goals is a daily practice, with consistent follow-through in

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<sup>52</sup> Grant Halvorson, H. *Get your team to do what it says it's going to do*. May 2014. Harvard Business Review.

<sup>53</sup> Perseus Digital Library. *Aristotle in 23 Volumes, Vol. 19: Book 2 - Aristotle, Nicomachean Ethics*. Translated by H. Rackham. Cambridge, MA, Harvard University Press; William Heinemann Ltd. 1934. <http://www.perseus.tufts.edu/hopper/text?doc=Perseus%3Atext%3A1999.01.0054%3Abook%3D2>.

rain or shine.

### **Whose Goal is this Anyway?**

If you currently hold a leadership position, do you ever feel as though others don't share the same motivation or drive as you do? What you may not know is that the root cause may not be weak motivations but weak goals.

The problem is that goals established solely by leaders may not be individually meaningful to others. The solution? Increase others' perceived locus of control by allowing them to make meaningful choices that let others maintain a certain degree of control over how the goal is established.

Research out of Trevecca Nazarene University has found that as we increase our perceived locus of control, we both *decrease* our procrastination and *increase* our performance.<sup>54</sup>

As an example, instead of specifying which projects will occur amongst a group of managers, allocate a set budget to a specific type of outcome and set the parameters for success. Then, let staff decide which projects they'll embark on by having them pitch their ideas and specify to you the when, where, and how. By doing so, staff can own the goals they set for themselves, while you monitor to ensure outcomes are achieved.

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<sup>54</sup> Carden R; Bryant C; Moss R. *Locus of control, test anxiety, academic procrastination, and achievement among college students*. Psychological Reports. Volume 95. Issue 2. October 1, 2004. pp. 581-582. <http://journals.sagepub.com/doi/10.2466/pr0.95.2.581-582>.

Not only do meaningful choices help others achieve higher performance, research from Dr. Paul E. Spector of the University of Florida shows that it can decrease our anxiety as well as a variety of cardiovascular diseases.<sup>55</sup>

Practically speaking, ask yourself whether you've recently seen your team demonstrate a lack of motivation or drive. Specifically:

1. Are staff regularly procrastinating on major deliverables?
2. Does the quality of the work appear poorer than in previous years, or simply poorer than what would be expected given the professional experience of the team?
3. Are issues of motivation demonstrated by multiple team members?

If you answer yes to any of the above questions, ask yourself what you could do to increase the number of meaningful choices staff take in their work. For example:

1. Can you provide simple parameters that would allow you to inform staff they could fully decide on the training they receive each year? These parameters might include (a) a maximum

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<sup>55</sup> Spector, Paul E. *Employee Control and Occupational Stress*. Current Directions in Psychological Science. Volume 11. Issue 4. August 2002. pp. 133-136.  
<http://citeseerx.ist.psu.edu/viewdoc/download?doi=10.1.1.926.3998&rep=rep1&type=pdf>.

budget per person, and (b) the need to focus on work-related activities.

2. Can you provide basic parameters for projects that would benefit the team and organization and allow the team to co-define with you the projects to take on for the next quarter or year? These simple parameters might include: demonstrated potential for profitability, low cost, outcomes clearly linked to company vision and strategic direction, etc.

3. Can you allow those that propose each project to co-define with you how the project should be executed, including project team, budget, timelines, and goals?

**Own the Outcome, Let Others Own the Rest:** for 20 *Productivity Points*, book twenty minutes to decide on a goal you've asked others to help you achieve. For example, a goal for the organization, team, unit, company, family, church, or non-profit where you volunteer. Ask yourself:

1. Was the goal set by you, by others, or was it a collaborative effort?

2. How many meaningful choices did others have in supporting the establishment of the goal?

During this time, think of ways you can let others 'own' the goal by asking them to propose to you the 'when', 'where', and 'how.' Assuming their approach is sound, let them own it and report to

you their progress. Your role becomes one of monitoring, but not micro-managing. You want to ensure they maintain optimal performance.

The benefit of this challenge is that it takes us out of our comfort zone, and asks us to release some control to those around us. It asks us to let others work with us to define goals that speak to them.

The science is clear: allowing others to have meaningful control of how their work is accomplished is the ideal situation for superior performance. In the end, what should matter most is the result you want to achieve and the satisfaction of those around you.

# 7

## Eat, Drink, and be Productive

*“One cannot think well, love well, sleep well, if one has not dined well.”*

- Virginia Woolf, English author and pioneer for women’s rights

### The planning brain

**I**n scientific circles, a certain region of the *ventrolateral frontal cortex* (vlTC) is getting some serious attention. The vlTC is a small component of the frontal lobes of the brain that is shared among both humans and primates and is associated with cognitive processes such as language and cognitive flexibility.

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<sup>56</sup> Neubert, Franz-Xaver; Mars, Rogier B; Thomas, Adam G; Sallet, Jerome; Rushworth, Matthew F S. *Comparison of Human Ventral Frontal Cortex Areas for Cognitive Control and Language with Areas in Monkey Frontal Cortex*. Neuron. Volume 81. Issue 3. February 5, 2014. pp. 700-713. <http://dx.doi.org/10.1016/j.neuron.2013.11.012>.

This much has been well-established, but the vITC became the star of the show when in 2014 Dr. Rushforth of Oxford and his colleagues published research that involved an extensive comparison of brain regions between humans and one of our closest relatives, macaque monkeys, using MRI scans. While this type of research is not uncommon, this time Dr. Rushforth and his colleagues discovered a tiny region of the vITC (only 1 of 12 vITC components) that was *entirely unique* to humans.

Researchers are still not fully certain what this specific region of the vITC is responsible for, but from existing knowledge of the brain they believe it is most likely related to our advanced ability to “plan into the future, be flexible in our approach, and learn from others.”<sup>57</sup> They note further that it most likely has an important role in “strategic planning and decision making as well as multi-tasking”<sup>58</sup>, the latter being our ability to quickly, albeit not perfectly, switch our focus back-and-forth between tasks.

Given this, it’s useful to step back and ask ourselves: what drives this little planning and decision-making powerhouse? And what can we do to optimize its effectiveness to boost our productivity?

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<sup>57</sup> University of Oxford. *Brain area unique to humans linked to cognitive powers*. January 28, 2014. <http://www.ox.ac.uk/news/2014-01-28-brain-area-unique-humans-linked-cognitive-powers>.

<sup>58</sup> Ibid.

## Cut sweets to cue success

While the brain accounts for just 2% of our body weight, it manages to consume 20% of our daily calories.<sup>59</sup> Its favorite meal? A constant supply of blood sugar or, more commonly, glucose<sup>60</sup>. This need for a *constant* supply is one reason you can feel slow and hazy if you've gone too long since your last meal. While other parts of your body can store energy, your brain is primarily in the business of consumption.

But before you down a big sugary cola for fuel, remember that for most of us the brain receives plenty of glucose from the various carbohydrates we eat each day, such as from fruits, vegetables, and grains.

In fact, in America at least we get more sugar in our diets than we could ever need. According to the U.S. Department of Agriculture (USDA), the average American consumes over *100 pounds* of excess sugar annually.

The result? According to the Centers for Disease control and Prevention (CDC) more than one in four Americans now have a metabolic syndrome such as high blood pressure or excess body fat, increasing their risk for heart disease, diabetes, and stroke.<sup>61</sup> Considering the potential impact of a stroke on one's

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<sup>59</sup> Nixon, Robin. *Brain Food: How to Eat Smart*. Live Science. January 7, 2009. <https://www.livescience.com/3186-brain-food-eat-smart.html>.

<sup>60</sup> Quistorff, Bjørn; Secher, Niels H; J Van Lieshout, Johannes. *Lactate fuels the human brain during exercise*. FASEB Journal. June 2008. <http://fasebj.org/content/22/10/3443.short>.

<sup>61</sup> Zuker, Charles S. *Food for the Brain*. Cell. Volume 161. Issue 1, March 26, 2015. pp. 9-11. <http://dx.doi.org/10.1016/j.cell.2015.03.016>.



long-term productivity, let alone one's life span and quality of life, we should all heed this warning.

Even if you don't have a metabolic syndrome, you may be experiencing a negative hit to your productivity and not even know it. According to Dr. Richard James Barnard at UCLA, excess sugar in the blood stream reduces the production of the brain chemical BDNF or brain-derived neurotrophic factor. Without BDNF we can't learn or remember much of anything. We don't even form memories properly.<sup>62</sup> Practically speaking, if you find yourself generally forgetful or slow, you may have too much sugar in your diet.

### **Alternatives to Sweets**

One way to keep your brain focused and fresh during the typical mid-morning and mid-afternoon slumps is to bring a small container of almonds and dried fruit such as raisins, dates, or apricots to your desk. According to Dr. Saida Haider of Karachi University, a diet of almonds added to one's meal plan has been shown to have significant hypophagic and nootropic effects.<sup>63</sup> In other words, they suppress our hunger and make us feel full while improving our memory and cognitive function.

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<sup>62</sup> Molteni R; Barnard RJ; Ying, Z; Roberts, CK; Gómez-Pinilla, F. *A high-fat, refined sugar diet reduces hippocampal brain-derived neurotrophic factor, neuronal plasticity, and learning.* Neuroscience. Volume 112. Issue 4. 2002. pp. 803-14. <https://www.ncbi.nlm.nih.gov/pubmed/12088740>.

<sup>63</sup> Haider, Saida; Batool, Z; Halee, DJ. *Nootropic and hypophagic effects following long term intake of almonds (Prunus amygdalus) in rats.* Journal of Hospital Nutrition. Volume 27. Issue 6. 2012. pp. 2109-2115. <https://dialnet.unirioja.es/servlet/articulo?codigo=4103430>.

I tried this technique myself a few years ago and can attest I no longer get the ‘3 pm blahs.’

As for sweet drinks, try having your coffee with no sweetener. Simple enough, and it’s actually pretty good if you have a good bean. For tea lovers, there’s been a real explosion of tea flavors that taste great without any sweetener. Some good categories to choose from are chai, rooibos, and mint-based teas.

Finally, don’t beat yourself up if you feel you consume too much sugar. Our attraction to sweets is biological. So, if you find yourself consuming more sugar than you’d like, consider replacing your old habits with new ones. For example, replace some of your higher-fat and higher-carbohydrate meals with more fruits and almonds. A ‘when-then’ implementation might go as follows: *when* I think about having my double-fudge brownie at the coffee shop on Saturday mornings, *then* I’ll buy a yogurt or banana. *When* I have a craving for a chocolate bar on weekday afternoons, *then* I’ll munch on some almonds I keep at my desk. Simple and effective.

**Productivity Your Brain (and Dentist) Will Love:** for 10 *Productivity Points*, take ten minutes to decide on whether you should alter your diet regarding the specific food or snacks you have at work and the types of beverages you drink throughout the day. Ask yourself:

1. Do I feel I’m consuming too much sugar?
2. Do I get energy crashes after my morning coffee or tea, or

after lunch?

3. Are there sweet drinks I can replace with water, or sweets I can avoid or minimize?

Based on your responses to the questions above, and your own ideas, make any adjustments to your planned drinks and snacks for tomorrow.

### **Caffeine and Productivity**

If you think your job is tough, ask a U.S. Navy SEAL trainee how they feel after an intense day of training and drills. Given the amount of work, both physical and mental, these SEAL's perform day and night, it's no surprise that the U.S. Government was curious as to how they could optimize the energy of these spirited men and women.

To find out what worked best, Dr. Harris R. Lieberman of the U.S. Army Research Institute of Environmental Medicine and colleagues examined 68 U.S. Navy SEAL trainees, randomly assigning 100, 200, or 300 mg of caffeine or placebo after 72 hours of sleep deprivation and continuous stress. About 1 to 8 hours after treatment, they were asked to perform a variety of tests to measure, among other things, reaction time, working memory, and mood state.

The result? The 200 and 300 mg doses “significantly improved” reaction time, memory, and alertness while

reducing self-reported fatigue and sleepiness.<sup>64</sup> The largest effect was one hour after administration, but the effect remained significant for eight hours afterwards. The researchers concluded that “200 mg appears to be optimal”<sup>65</sup> given the conditions of the SEAL trainees.

While you and I probably don’t have as intense a regimen as a Navy SEAL trainee, we can certainly benefit from this knowledge. When it’s impossible to sneak in a nap, or when you need that extra energy boost for an important meeting or project, a little bit of caffeine goes a long way. Just keep in mind, it doesn’t take a lot.

One Grande Starbucks Café Americano® contains 225 *mg* of caffeine<sup>66</sup>. The Venti size? 300 mg. At 300 mg, this is the *high* end of the test that was performed on the Navy SEALs that lacked 3 days straight of sleep in a high-stress environment.

So, if caffeine is so potent, what’s going on in our bodies and brains when we gulp down a coffee or tea?

In technical terms, caffeine acts as an adenosine-receptor antagonist. Think of it like a game of musical chairs. Both caffeine and adenosine *could* technically sit in a chair, or bind to an adenosine receptor, but once caffeine takes all the chairs,

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<sup>64</sup> Lieberman, HR; Tharion, WJ; Shukitt-Hale, B; et al. *Effects of caffeine, sleep loss, and stress on cognitive performance and mood during U.S. Navy SEAL training*. Journal of Psychopharmacology. Volume 164. Issue 3. November 2002. pp. 250–261. <https://link.springer.com/article/10.1007/s00213-002-1217-9>.

<sup>65</sup> Ibid.

<sup>66</sup> CaffeineInformer. *The Complete Guide to Starbucks Caffeine*. May 26, 2017. <https://www.caffeineinformer.com/the-complete-guide-to-starbucks-caffeine>.

adenosine is left standing. Without adenosine binding to its receptors, your central nervous system is blocked from feeling naturally sleepy or slow when your body hasn't had sufficient rest.<sup>67</sup>

While caffeine blocks adenosine from binding to your receptors, the amount of adenosine continues to build up in the brain. With too much caffeine in the brain, once it metabolizes your built-up adenosine floods your adenosine receptors and you 'crash', feeling intense fatigue.<sup>68</sup> This effect can also cause you to be irritable and have difficulty concentrating, all things that take a serious hit to your productivity. If you treat the problem with more coffee, you perpetuate the cycle further.

As you can imagine, we need to be cautious as caffeine can mask our body's natural signals that we should really be getting more sleep. Our bodies could be begging us to sleep and we don't even know it, as we dutifully wait in line at the café for another coffee.

In addition, when consuming caffeine your body kicks into a higher gear where the adrenal glands produce more adrenaline.<sup>69</sup> This 'fight or flight' hormone gives you a burst of energy and attention, which is nice in small doses and crazy-

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<sup>67</sup> McGill University. *The Brain from Top to Bottom: How Drugs Affect Neurotransmitters*. Accessed Feb. 7, 2017. [http://thebrain.mcgill.ca/flash/i/i\\_03/i\\_03\\_m/i\\_03\\_m\\_par/i\\_03\\_m\\_par\\_cafeine.html](http://thebrain.mcgill.ca/flash/i/i_03/i_03_m/i_03_m_par/i_03_m_par_cafeine.html).

<sup>68</sup> Reissiga, Chad J; Straina, Eric C; Griffiths, Roland R. *Caffeinated energy drinks—A growing problem*. *Drug and Alcohol Dependence*. Volume 99. Issue 1. January 1, 2009. pp. 1–10. <https://doi.org/10.1016/j.drugalcdep.2008.08.001>.

<sup>69</sup> Ibid.

inducing in others.

While your body is flooded with adrenaline it also receives a strong hit of dopamine, the ‘pleasure’ hormone that can result in feelings of enjoyment, but also potential long-term addiction. If you’re drinking one or more cups of coffee every day, you can develop a tolerance that can diminish its effect when you need it most.

Research shows significant tolerance develops within one to three days of the start of caffeine exposure and is only lost within three to four days after cessation.<sup>70</sup> This good news means we can ‘reset’ our baseline if we cut out our caffeine for just a few days. It also means we can get the most energy-per-dose if we use caffeine sparingly, like just before writing a big report or exam.

I find this technique highly effective. I used to drink two cappuccinos per day, almost every day in my twenties. I learned it was working against my effectiveness as an additional coffee here or there no longer had any effect. After cutting out caffeine and using it sparingly, I’ve had much greater success. Since then, I now enjoy one to two small cups of self-brewed coffee a day, and never after 4:00 pm to guard my sleep. My coffee-drinking habits aren’t always perfect, but they’re greatly

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<sup>70</sup> Finn, IB; Holtzman, SG. *Tolerance to caffeine-induced stimulation of locomotor activity in rats*. Journal of Pharmacology and Experimental Therapeutics. Volume 238. Issue 2. August 1986. pp. 542-546. <http://jpet.aspetjournals.org/content/238/2/542.short>.

improved given what I now know.

### **Energy drinks not without risks**

As for those of us that enjoy energy drinks, buyer beware. Recent studies show that with hundreds of energy drinks now available on store shelves, some have as much as 505 mg of caffeine per can or bottle.<sup>71</sup>

The same studies found increasing reports of caffeine intoxication from energy drinks. Be aware that your drink may have additional stimulants such as Guarana and Yohimbine, as well as considerable amounts of sugar.

While coffee and tea is generally within a moderate range of caffeine, if you avoid adding shots, energy drinks have a much wider range of possibility. Research shows that for those who are particularly sensitive to caffeine, consuming more than 400 mg of caffeine per day can result in headaches, drowsiness, anxiety, and nausea.<sup>72</sup> If your goal is to maximize your productivity, be sure to read the label before consuming.

So, while caffeine has a fair number of potential side effects, it can be a useful tool to sustainably boost productivity, but only if used strategically.

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<sup>71</sup> Reissiga, Chad J; Straina, Eric C; Griffiths, Roland R. *Caffeinated energy drinks—A growing problem*. Drug and Alcohol Dependence. Volume 99. Issue 1. January 1, 2009. pp. 1–10. <https://doi.org/10.1016/j.drugalcdep.2008.08.001>.

<sup>72</sup> Smith A. *Effects of caffeine on human behavior*. Food Chemical Toxicology. Volume 40. Issue 9. September 2002. pp. 1243–1255. <http://www.sciencedirect.com/science/article/pii/S0278691502000960>.

**Strategic Drinking:** for 5 *Productivity Points*, decide on whether you would like to cut back on the caffeine in your diet. To help decide, ask yourself:

- Do I feel jittery or anxious after a drink?
- Do I have trouble sleeping?
- Do I feel my heart pounding at any point during the day?
- Can I substitute a short walk, a healthy snack, or water for any extra coffee, tea, or cola I cut out of my daily routine?

Reflect on your responses to these questions, and adjust your caffeine routine accordingly.

The purpose of this challenge is to ensure we don't let the downsides of caffeine overtake the upsides, which is a boost to cognitive function when we need it most. With that boost comes a boost to stress hormones and potential addiction, so drink strategically for best results.

### **The Ultimate Coffee Nap**

How would you like to boost cognitive speed and alertness by 378% over caffeine alone? Enter the coffee nap. As per Dr. Louise A. Reyner of Loughborough University, research has shown that by combining caffeine and a nap, the effects of wakefulness can be increased by a factor of *three to four*



*times*.<sup>73</sup>

In the study, Reyner combined a brief nap with 200 mg of caffeine, taken immediately beforehand. As we've seen earlier, this is about the same amount of caffeine as from a single Grande Starbucks® coffee. The reason this works is because caffeine takes about 15-20 minutes to take effect, the perfect window for a mini nap.

Though I didn't know the science behind coffee naps in university, I tried the approach after hearing it from a colleague. Sure enough, it worked well and helped me stay focused during long study sessions.

**The Ultimate Coffee Nap:** for 20 *Productivity Points*, decide on whether and when you'd like to try the coffee nap. If you feel self-conscious about taking a nap at the office, you may want to try this on a day off, on days you work from home during your break time, or in your car during lunch. I'll admit it felt weird to try this at work but I did it during my lunch and afterward I felt *phenomenal*.

## The Driving Force of All Nature

For as far back as I can remember, there was only one piece of

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<sup>73</sup> Reyner, LA; Horne, JA. *Suppression of sleepiness in drivers: Combination of caffeine with a short nap*. Journal of Psychophysiology. Volume 34. 1997. pp. 721–725. <http://onlinelibrary.wiley.com/doi/10.1111/j.1469-8986.1997.tb02148.x/full>.

advice regarding water – drink it, and drink it *eight times a day*.

It turns out no one knows for certain where the eight-glasses idea comes from. One theory is that it arose from a 1945 recommendation by the Food and Nutrition Board (FNB) of the U.S. National Research Council that adults consume “1 milliliter of water for each calorie of food”, or about 2.5 liters for men and 2 liters for women. When you run the math, 2 liters is about eight 8-ounce glasses of water. And so, the 8x8 myth was born. What is often forgotten however is that researchers noted in the very next sentence of this report: “...Most of this quantity is contained in prepared foods.”<sup>74</sup>

Despite the persistence of the ‘8 glasses a day’ myth, we now know that in general we need about 64 ounces of water per day (8x8) but that this total can come from any source, food or liquid. This intake is necessary for proper brain functioning as our bodies consist mostly of water, about 50-70%, whereas our blood and brain both contain high water content, 85% and 75% respectively.<sup>75</sup>

In addition, research out of the U.S. Centre for Human Nutrition, identified that decreased “...cognitive performance can occur when 2% of body weight or more is lost due to water

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<sup>74</sup> Heinz Valtin; Gorman, Sheila A. *Drink at least eight glasses of water a day. Really? Is there scientific evidence for “8 × 8”?* American Journal of Physiology: Regulatory, Integrative and Comparative Physiology. Volume 283. Issue 5. November 1, 2002. pp. R993-R1004. <http://ajpregu.physiology.org/content/ajpregu/283/5/R993.full.pdf>.

<sup>75</sup> Ibid.

restriction, heat, and/or physical exertion.”<sup>76</sup>

As per Dr. Barry Popkin of the Department of Nutrition at the University of North Carolina and his colleagues, even mild dehydration alters “a number of important aspects of cognitive function such as concentration, alertness and short-term memory.”<sup>77</sup>

So how do we know if we’re getting enough for optimal performance? Given we all live in different climates, have different resting metabolic rates, and perform different levels of physical activity, the amount of water we each need will be unique. According to research on the body’s fluid regulation system by Dr. Michael Ferret of the Biomedicine Discovery Institute at Monash University and his colleagues, “If we just do what our body demands us to we’ll probably get it right - just drink according to thirst rather than an elaborate schedule.”<sup>78</sup>

Getting more water is great advice, but not always common practice. Personally, I find I can get so focused on a project or task that I forget to listen to my own body and its internal needs. If you find yourself feeling slow or fatigued, take a moment and think about the last time you had a glass of water, or any food or

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<sup>76</sup> Grandjean, Ann C; Grandjean, Nicole R. *Dehydration and Cognitive Performance*. Journal of the American College of Nutrition. Volume 26. Issue 5. July 16, 2007. pp. 549S-554S. <http://dx.doi.org/10.1080/07315724.2007.10719657>.

<sup>77</sup> Popkin, BM; D’Anci, KE; Rosenberg, IH. *Water, Hydration and Health*. Nutrition Reviews. Volume 68. Issue 8. 2010. pp. 439–458. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2908954/>.

<sup>78</sup> Monash University. *Do you really need eight glasses a day? Study Challenges Idea of Mandatory Water Intake*. October 7, 2016. Published by Science Daily. [www.sciencedaily.com/releases/2016/10/1610071111027.htm](http://www.sciencedaily.com/releases/2016/10/1610071111027.htm).

liquid of substance.

Consider that coffee, tea, and alcohol are all diuretic and so if you consume these throughout the day and you still feel fatigued, assuming you had a restful sleep, you'll want to increase your water consumption to get back to your best mental state.

Remember to listen to your body throughout the day, especially if you feel tired, slow or mildly confused and have already enjoyed a good night's rest. If you have difficulty listening to your body's hydration needs, some physical signs of potential dehydration include tongue dryness, a sense of confusion, dry mouth, and upper body muscle weakness.<sup>79</sup>

Ultimately, only you know how much water you need to be at your best. The good news is that as we've seen, there are numerous benefits to getting more, and the ways to get it are plentiful and easy to implement into your daily routine.

**Water, Water Everywhere:** for 5 *Productivity Points*, set a reminder for this evening to pack a re-usable water bottle or thermos to ensure you have easy access to water throughout the day. Ideally, have this water accessible at your desk, in the car, on transit, etc. If you already do this, great! Also, see if you can add in more fruits and vegetables to your weekly meals and take water as a substitute for one or more coffees or teas.

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<sup>79</sup> Gross, Cynthia R; Lindquist, Ruth D; Woolley, Anthony C; Granieri, Rosann; Allard, Karen; Webster, Beth. *Clinical indicators of dehydration severity in elderly patients*. The Journal of Emergency Medicine. Volume 10. Issue 3. May-June 1992. pp. 267-274.  
[https://doi.org/10.1016/0736-4679\(92\)90331-M](https://doi.org/10.1016/0736-4679(92)90331-M).

While '8 glasses a day' is a myth, getting enough water in your diet is vitally important to your cognitive health and productivity. As the brain is 75% water, and as it's easily influenced by just slight decreases in water supply, you need to do what you can to ensure you're always getting enough.

# 8

## The Science of Sleep and Productivity

*“If you have no time to rest, it’s exactly the right time.”*

- Mark Twain, American writer, humorist, entrepreneur, publisher, and lecturer.

### Get ahead by getting to bed

**Y**ou’ve heard the pitches before. Sleep is good for you. Get your ‘8 hours’. Sleep improves your memory! And so on.

The National Sleep Foundation is clear in their recommendation. For adults, it’s 7-9 hours every night.<sup>80</sup> You

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<sup>80</sup> National Sleep Foundation. *How Much Sleep do we Really Need?* Accessed February 5, 2017. <https://sleepfoundation.org/how-sleep-works/how-much-sleep-do-we-really-need>.

may be thinking this is all common sense, but unfortunately, it's not common action.

According to the Centers for Disease Control and Prevention (CDC), among a survey of over 74,000 adults in 12 U.S. states, over 35% reported that they received less than 7 hours of sleep.<sup>81</sup>

Moreover, 38% reported unintentionally falling asleep during the past month. About 5% reported this nodding off was behind the wheel of a moving vehicle.<sup>82</sup>

Worse, the National Department of Transportation estimates our sleep deprivation is responsible for 1,550 U.S. deaths every year, and over 40,000 non-fatal injuries.<sup>83</sup>

And we shouldn't be surprised by such high fatality rates. Harvard professor and sleep expert Charles Czeisler notes that having just 4 to 5 hours of sleep a night induces impairment equivalent to a blood alcohol level of 0.1%.<sup>84</sup> In other words, for a typical 180-pound individual, about 5 to 6 drinks.<sup>85</sup>

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<sup>81</sup> Centers for Disease Control and Prevention. *Morbidity and Mortality Weekly Report*. Volume 60. Issue 8. March 4, 2011. <https://www.cdc.gov/mmwr/PDF/wk/mm6008.pdf>.

<sup>82</sup> Ibid.

<sup>83</sup> National Highway Traffic Safety Administration: National Center on Sleep Disorders Research. *Drowsy driving and automobile crashes: NCSDR/NHTSA Expert Panel On Driver Fatigue And Sleepiness*. 2007. [https://one.nhtsa.gov/people/injury/drowsy\\_driving1/Drowsy.html#NCSDR/NHTSA](https://one.nhtsa.gov/people/injury/drowsy_driving1/Drowsy.html#NCSDR/NHTSA).

<sup>84</sup> Czeisler, CA. *A conversation with Harvard Medical School professor Charles A. Czeisler*. Harvard Business Review. October 2006. Volume 84. Issue 10. October 2006. pp. 53-59. <https://www.ncbi.nlm.nih.gov/pubmed/17040040>.

<sup>85</sup> Stim, Rich. *Blood Alcohol Level Chart: Are You Too Drunk to Legally Drive?* DrivingLaws.org. <http://dui.drivinglaws.org/drink-table.php>.

According to research by Dr. William Killgore of the Division of Sleep Medicine at Harvard, “there is a broad consensus that insufficient sleep leads to a general slowing of response speed.”<sup>86</sup> This much he notes is widely known, however Dr. Killgore was most interested in whether sleep loss affected cognitive capabilities globally or whether certain functions were impacted more than others.

Dr. Killgore’s findings were surprising. Although the prefrontal cortex was *particularly* impacted by sleep loss, we could still perform certain tasks, albeit not consistently well, such as rule-based decisions. In contrast, activities such as being creative, thinking differently, and innovating were significantly degraded. This degradation occurred *even when alertness and vigilance was restored* thanks to stimulants the participants had taken.<sup>87</sup>

In another study, Eun Yeon Joo, Cindy W Yoon, and their colleagues at Sung-kyun-kwan University of Korea, examined six healthy volunteers in their prime (23-27 years of age) who were specifically identified as good sleepers and had no medical or psychiatric histories.

All volunteers underwent both blood and cognition tests before and after just 24 hours of continuous wakefulness.

The result? Post sleep-deprivation, the participants

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<sup>86</sup> Killgore, William DS. *Effects of sleep deprivation on cognition*. Progress in Brain Research. Volume 185. December 2010. pp. 105-129. [https://www.researchgate.net/publication/47790667\\_Effects\\_of\\_sleep\\_deprivation\\_on\\_cognition](https://www.researchgate.net/publication/47790667_Effects_of_sleep_deprivation_on_cognition).

<sup>87</sup> Ibid.



experienced *significantly elevated* levels of the stress hormones cortisol, epinephrine, and norepinephrine.<sup>88</sup>

Further, participants experienced lowered attention and working memory. Basically, healthy young adults were turned into stressed, anxious, and forgetful individuals in just a single day.

### **The Cost of Lost Sleep**

When ‘burning the midnight oil’ embeds itself in corporate culture, the effect on the bottom line can be alarming. Recently, a survey of over 4,100 employees at four US corporations was published in the *Journal of Occupational Health and Medicine*, examining the impact of sleep on productivity. In the survey, four groups of individuals were identified: ‘insomniacs’, those with ‘insufficient sleep’, those ‘at-risk of insufficient sleep’, and ‘good sleepers.’ The research indicated that compared with the ‘at-risk’ and ‘good sleepers’ groups, the ‘insomniacs’ and those with ‘insufficient sleep’ had “significantly worse productivity ...” In quantitative terms, researchers found the fatigue-related productivity losses to be an estimated *\$1,967 per employee*

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<sup>88</sup> Joo, Eun Yeon; W Yoon, Cindy; Lim Koo, Dae; Kim, Daeyoung; Bong Hong, Seung. *Adverse Effects of 24 Hours of Sleep Deprivation on Cognition and Stress Hormones*. *Journal of Clinical Neurology*. Volume 8. Issue 2. June 29, 2012. pp. 146–150.  
<https://www.ncbi.nlm.nih.gov/pubmed/22787499>.

each year.<sup>89</sup> Assuming you work in a Fortune 500 company with an average head count of 50,000 globally, this is a 98-million-dollar problem.<sup>90</sup>

**Get to Bed to Get Ahead:** for 10 *Productivity Points*, ask yourself: do I believe I'm getting enough sleep on average, i.e. 7 to 9 hours each night? If not, add some reminders in your home, in your calendar, or send an e-mail reminder at bedtime to stay on track.

The research is clear. Whether it's for improved productivity or simply general health, we need to ensure we have sufficient rest to be our most productive.

### **Always daytime, never night**

Ever feel like you have difficulty getting to sleep after a long session on your laptop? According to research from Dr. Anne-Marie Chang of the Brigham and Women's Hospital, part of the reason we may be up late is that most of our devices from tablets to laptops and smartphones emit a bright blue light that

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<sup>89</sup> Rosekind, Mark R; Gregory, Kevin B; Mallis, Melissa M; Brandt, Summer L; Seal, Brian; Lerner, Debra. *The Cost of Poor Sleep: Workplace Productivity Loss and Associated Costs*. Journal of Occupational and Environmental Medicine. Volume 52. Issue 1. January 2010. pp. 91-98. <https://www.ncbi.nlm.nih.gov/pubmed/20042880>.

<sup>90</sup> Calculation:  $50,000 \times 1,967 = 98,000,000$ .

mimics light from the sun.<sup>91</sup>

When our brains perceive this light, our internal clocks are tricked into thinking it's still light out. As a result, we stop producing melatonin, a hormone responsible for cueing our bodies to sleep.

So, what can we do about it? The most effective strategy is to go device-free after 9:00 pm to ensure your body has time to naturally prepare for sleep with increased melatonin. If this is not possible, try to use your devices for just short bursts of time, enable a device's 'night mode' where possible, and limit non-essential browsing.

**Blue-light Downtime:** for 10 *Productivity Points*, ask yourself, "Am I device-free after 9pm?" If not, add reminders in your home, in your calendar, or send an e-mail reminder at 9:00 pm, or 1-2 hours before bedtime, to keep on track.

The purpose of this challenge is to get into the habit of gradually easing your body into sleep. Getting blue-light downtime can ensure you get a full night's rest, which supports improved cognitive speed, mood, and alertness. All key components of high productivity.

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<sup>91</sup> Brigham and Women's Health. *Light-Emitting E-Readers Before Bedtime Can Adversely Impact Sleep*. December 22, 2014.  
[http://www.brighamandwomens.org/about\\_bwh/publicaffairs/news/pressreleases/PressRelease.aspx?sub=0&PageID=1962](http://www.brighamandwomens.org/about_bwh/publicaffairs/news/pressreleases/PressRelease.aspx?sub=0&PageID=1962).

# 9

## **Exercise, Mindfulness, and Meditation: Three Pillars of Productivity**

*“If we could give every individual the right amount of nourishment and exercise, not too little and not too much, we would have found the safest way to health.”*

- Hippocrates, physician and ‘father of modern medicine’

### **The Mind-Body Connection**

**A**ccording to Dr. Sandra Bond Chapman, Director of the Center for BrainHealth at the University of Texas, while multiple internal and external factors affect our ability to maintain and develop cognitive performance throughout our

lives, it is *aerobic exercise* that has a significant positive impact in numerous areas of the brain.

Specifically, Chapman noted from her research findings that physical exercise, particularly aerobic exercise, is documented to counter “cognitive declines including memory, executive function, visuospatial skills, and processing speed in normally aging adults.”<sup>92</sup> All elements that are critical to ensuring optimal productivity.

The best part? It doesn’t take much to receive the positive effects. While some studies examine long-term benefits that come from six or more months of physical activity, the results described above were shown to occur after just twelve weeks with small one-hour sessions, just three times per week.

In the study, participants were asked to use a combination of exercise bike and treadmill, however the research suggests comparable results can be achieved through various activities that bring your heart rate up for a similar period, multiple times per week.

The exercise-performance connection is also seen in how it can increase brain volume in areas implicated in executive processing. A meta-analysis of 29 controlled studies, including over 2,000 participants, concluded that aerobic exercise

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<sup>92</sup> Chapman, Sandra B; et. al. *Shorter term aerobic exercise improves brain, cognition, and cardiovascular fitness in aging*. *Frontiers in Aging Neuroscience*. Volume 5. November 12, 2013. <http://journal.frontiersin.org/article/10.3389/fnagi.2013.00075/full>.

demonstrated improvements in “attention and processing speed, executive function, and memory.”<sup>93</sup>

Importantly though, it’s not about pushing our bodies to the limits. More pain does not equal more mental gain. According to neuroscientist and physiotherapist Dr. Michelle Ploughman of Memorial University in Canada, “Moderation is important. Sustained increases in neurotrophin levels occur with prolonged *low intensity* exercise ... higher intensity exercise elevates the stress hormone corticosterone.”<sup>94</sup>

So why is a sustained increase in neurotrophins beneficial? Essentially, neurotrophins are small proteins secreted by the nervous system that keep your nerve cells alive. They’re also responsible for stimulating the growth of new dendrites and can cut back existing dendrites or nerve cells to make room for new growth.<sup>95</sup>

But the benefits of exercise don’t stop there. According to Dr. Carl Cotman of the University of California, exercise “reduces peripheral risk factors such as diabetes, hypertension and

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<sup>93</sup> Smith, PJ; Sherwood, A. *Aerobic Exercise and Neurocognitive Performance: a Meta-Analytic Review of Randomized Controlled Trials*. Psychosomatic Medicine. Volume 72. Issue 3. 2010. pp. 239–252. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2897704/>.

<sup>94</sup> Ibid.

<sup>95</sup> Huang, EJ; Reichardt, LF. *Neurotrophins: Roles in Neuronal Development and Function*. 2001. Annual Review of Neuroscience. Volume 24. pp. 677–736. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC2758233/>.

cardiovascular disease, which converge to cause brain dysfunction and neuro-degeneration.”...<sup>96</sup>

While the connection between exercise and cognitive performance is clear, what does this look like in practice?

In one study of one hundred and forty- employees of an American northwest community, their fitness levels were compared against a variety of factors from perceived productivity to absenteeism and job satisfaction over a one-year period. Researchers found that most employees believed their fitness was directly related to their higher levels of productivity in terms of being able to “better relax at work, think more clearly about work related problems, and concentrate better on work tasks” and ultimately that this affected their quality of work performance.<sup>97</sup>

Another study, by Dr. Ned Hartfiel of the Centre for Health Economics and Medicines in the U.K. and others, identified that an on-site yoga program for 37 study participants resulted in “*significant* reductions in perceived stress and back pain, and a

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<sup>96</sup> Cotman, Carl W; Berchtold, Nicole C; Christie, Lori-Ann. *Exercise builds brain health: key roles of growth factor cascades and inflammation*. Trends in Neuroscience. Volume 30. Issue 9. September 2007. pp. 464-472. <http://www.sciencedirect.com/science/article/pii/S0166223607001786>.

<sup>97</sup> Wattles, Matthew G; Harris, Chad. *The relationship between fitness levels and employee’s perceived productivity, job satisfaction, and absenteeism*. Journal of Exercise and Physiology. Volume 6. Issue 1. February 1, 2003. <https://pdfs.semanticscholar.org/e961/e875def0f766291a35cbc43a682d93aad4d8.pdf>.

substantial improvement in psychological well-being.”<sup>98</sup> Participants also reported significantly higher scores for attentiveness, a key aspect of focused productivity.

These findings are significant for employers given that stress and back pain are two major factors associated with absenteeism and sickness in the workplace. The researchers of the above study found that these two factors alone cost the U.K. industry 17 billion pounds per year, or up to 18.4 million workdays lost per year.<sup>99</sup>

These findings reinforce those identified by Dr. Rudra Bhandari and others at the 6th World Congress of Biomechanics which showed that in a study of 50 men and women, a corporate yoga program supported improvements in employee “work motivation, commitment, performance, and productivity...”<sup>100</sup>

Indeed, yoga is no exception in improving performance. In a study by Dr. Nealia Bruning of Kent State University and David Frew of Gannon University, they hypothesized that the type of aerobic exercise was less important than the simple fact that participants stuck with the routine for a sustained period. For

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<sup>98</sup> Hartfiel, N; Burton, C; Rycroft-Malone, J; Clarke, G; Havenhand, J; Khalsa, SB; Edwards, RT; *Yoga for reducing perceived stress and back pain at work*. London Journal of Occupational Medicine. September 25, 2012. Volume 62. Issue 8. pp. 606-612.  
<https://academic.oup.com/occmed/article/62/8/606/1441276/Yoga-for-reducing-perceived-stress-and-back-pain>.

<sup>99</sup> Ibid.

<sup>100</sup> Bhandari R; Acharya B; Katiyar, VK. *Corporate Yoga and Its Implications*. 6th World Congress of Biomechanics. August 1-6, 2010 in Singapore. pp. 290-293.  
[https://link.springer.com/chapter/10.1007/978-3-642-14515-5\\_75](https://link.springer.com/chapter/10.1007/978-3-642-14515-5_75).



the experiment, volunteers were asked to spend 30 to 45 minutes at least four times per week, doing any number of aerobic fitness activities, such as walking, running, swimming, stationary or regular bicycle riding. Participants could also switch between these activities at their leisure. All exercise was completed by the employees before work, during their lunch hour, or after work.

At the end of the study, the researchers found that indeed positive results occurred for *all exercise types* and that they had “positive impact on both job satisfaction and productivity.”<sup>101</sup>

### Getting Enough in a Modern World

Given aerobic exercise improves our cognitive performance in numerous ways, you would think we would all be physically active. That said, many of us live in communities that don’t exactly make exercise a walk in the park.

Consider the following scenario. You live in the suburbs of a relatively large city. On weekends, most places you need to visit are designed for you to drive your car right up to the door. Further, you can now order your groceries online and have them hand-delivered to your car at a convenient pick-up point, or even shipped directly to your doorstep. Great for convenience, but not so great for your health.

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<sup>101</sup> Frew, David R; Bruning, Nealia S. *Improved Productivity and Job Satisfaction Through Employee Exercise Programs*. Hospital Materiel Management Quarterly. Volume 9. Issue 4. May 1988. pp. 62-69. [https://www.researchgate.net/publication/13011748\\_Improved\\_Productivity\\_and\\_Job\\_Satisfaction\\_through\\_Employee\\_Exercise\\_Programs](https://www.researchgate.net/publication/13011748_Improved_Productivity_and_Job_Satisfaction_through_Employee_Exercise_Programs).

On weekdays, you commute to work in your car. You would take public transit if you could but you live too far from work.

When you get to your office, your work is confined mostly to your desk. While the most exercise you receive is walking to the coffee shop downstairs, your colleagues have just brought in a fancy new single-cup coffee machine that means you can now have coffee just steps from your desk.

I have an admission to make. If you haven't guessed, this is my story! It might be yours as well. In this type of environment, you and I need to make a *conscious effort* to get aerobic exercise. Left to our own devices, we'll shuttle ourselves from chair to couch to seat throughout the day with little increase in our heart rate.

So, if you can relate to the above scenario, here's a tip: pre-commit yourself to not just take a single trip to the gym, or a single run, but to a healthy *habit*. For example, decide that for twelve weeks you'll perform one or more aerobic exercises that get your heart rate up for about one hour, three times per week.

If one hour is too much to schedule in for a single day, think about thirty minutes each day. Do this by scheduling the time for the next twelve weeks in your calendar.

Pick a time of day that will be least likely to be cancelled. Personally, I prefer first thing in the morning (5:45 to 6:15 am) or later in the evening (7:00 to 7:30 pm). These times have the least interruptions and work/family commitments.

You don't need to be too rigid, though. You want to ensure you get a variety of exercises that keep you motivated throughout the twelve weeks. In my case, I like to commit to

jogging or some other single activity for long periods of time. I'm also the kind of person that can eat the same breakfast cereal for years. It doesn't really matter what you do as all aerobic activities are beneficial. Here are some examples to help you fill your calendar:

### **1: Walking**

Though it's low intensity, the benefits for your brain and health are clear. There's nothing wrong with saying you're going to walk around the neighborhood, walk around shops in a closed or open mall, walk to get a coffee at Starbucks, or walk to the store. This is a wonderful low-intensity way to get your exercise.

Further, you can do this activity with your spouse or a friend and it becomes a great way to connect. Even in a suburban setting, my wife and I still like to fit in walks to local coffee shops whenever we can.

### **2: Hiking**

This activity is ideal if you have park or forest trails near your work or home. Also, hiking is a frugal but fun activity you can do with your significant other, with a friend, or with kids.

### **3: Swimming**

Left to my own devices, I would sit in the hot tub and sauna, but when I go to the pool with my kids I really get my heart rate going.

Swimming at the local pool or beach is a great way to get in some activity with friends or family. Also, if you have a pool in the backyard, you might as well make the most of it!

#### **4: Yoga**

Though traditional yoga is low intensity, as we've seen from previous research, it's clearly beneficial for cognitive performance. There are also additional benefits to aid us in maintaining our focus, which we'll discuss in the next section.

#### **5: Treadmill, step-machine, and exercise bike**

These are less exotic aerobic activities, but they're mentioned here as you may live in an environment that is just too darn cold or hot to regularly go for a run, walk, or hike outside. Many gyms now have exercise machines with built-in video screens that can allow you to catch up on your favorite TV show, watch a movie, or pretend you're exercising in an exotic location. Personally, I like to catch up on global news on the overhead TV's, or, if I'm 'newsed-out' I listen to a good podcast.

#### **6: Jogging and running**

These tried-and-true activities are best if you have an interesting path such as a flat trail along the beach, waterfront, or a winding path in the woods. Some may find these activities dull or repetitive, and they can be if you're just running down a straight

road. That said, if you have the right surroundings it can be very enjoyable.

## **7: Kickboxing**

My workplace offers this activity and it's great for both men and women that want to combine health benefits with some useful martial arts. Many of my colleagues say they love it, and mention it's a terrific way to socialize and stay active during their lunch break.

**Fit For Life:** for 10 Productivity Points, ask yourself: are there ways I'd like to be more active in my weekly routine? If so, add one or more aerobic fitness sessions into your weekly calendar. Some suggestions include an evening walk with your spouse or kids, a walk with a friend in a trendy area of town, park visits with your kids or family, hiking on local trails, organized sports, swimming, and gym visits.

Exercise is not only great for your body, it's fantastic for your brain and productivity. Whether you need a boost to cognitive speed, mood, memory, or alertness, aerobic exercise delivers. So, when you feel your mind is in a rut, consider putting down the pen, closing the laptop, and going out for a walk or a light jog. It might be the smartest thing you could do to jolt your brain to better performance.

## Mindfulness and Meditation

Mindfulness. It's a loaded word that implies to some perhaps something we do all the time. After all, when are we *not* mindful?

Truth is, mindfulness is indeed simple to execute but, I will be the first to admit, it's not something I always do.

While we're awake and actively performing a task, we're often thinking of other things, such as whether we need to do the laundry when we get home, whether we want to check our e-mail or the news, whether we feel hot or cold, etc.

Being mindful is about focus, and it's a powerful tool for productivity. Dr. Ruth A. Baer of the University of Kentucky, author of the paper *Mindfulness Training as a Clinical Intervention*, defines it simply as "bringing one's attention to the internal and external experiences occurring in the present moment."<sup>102</sup> This practice is often taught through a combination of simple meditation exercises.

The key aspect of mindfulness is that it's *intentional* and non-judgmental *focusing of our attention*. Think of it as exercising your attention muscle.

When mindfulness is achieved, we can enter a state of intense and focused attention, or what Dr. Mihály

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<sup>102</sup> Baer, Ruth A. *Mindfulness Training as a Clinical Intervention: A Conceptual and Empirical Review*. *Journal of Clinical Psychology: Science and Practice*. Volume 10. Issue 2. Summer 2003. pp. 125-143. <http://www.wisebrain.org/papers/MindfulnessPsyTx.pdf>.

Csikszentmihályi calls, more commonly, *flow*.<sup>103</sup> As Dr. Csikszentmihályi notes, happiness is not about relaxing on a cloud without a care or thought in the world, but rather it is “characterized by complete absorption in what one does.”<sup>104</sup>

If you’ve ever been completely engrossed in a project, or game, or activity that you love, you know how exhilarating and effective focused attention can be for moving us toward completion of our goals.

In addition to helping us find flow in our work, mindfulness has been shown to increase our willpower to avoid temptations that can pull us away from our long-term goals.

In one study, 18 obese women volunteered for a 6-week intervention using standard mindfulness exercises. Following the intervention, binge eating activities were reduced from four times per week to less than twice per week, with the severity of each binge reduced. Further, both depression and anxiety decreased significantly while participants reported an increased sense of control.<sup>105</sup>

I personally stumbled across mindfulness in my third year of university when I became highly interested in meditation to stay focused on my coursework. A colleague of mine who came over

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<sup>103</sup> Nakamura, Jeanne; Csikszentmihalyi, Mihaly. *Flow and the Foundations of Positive Psychology*. August 9, 2014. pp. 239-263. [https://link.springer.com/chapter/10.1007%2F978-94-017-9088-8\\_16](https://link.springer.com/chapter/10.1007%2F978-94-017-9088-8_16).

<sup>104</sup> Ibid.

<sup>105</sup> Kristeller, JL; Hallett CB. *An Exploratory Study of a Meditation-based Intervention for Binge Eating Disorder*. *Journal of Health Psychology*. Volume 4. Issue 3. May 1999. pp. 357-63. <https://www.ncbi.nlm.nih.gov/pubmed/22021603>.

to Canada from Malaysia told me that he used it when he needed to work on a long research report or essay.

First, he would find a quiet area and sit still while letting his thoughts float by without focusing on them, or judging them. Instead, he would attempt to remain focused on his breathing as he slowly breathed in and out. It was all remarkably simple and so I gave it a try.

At first it felt odd, as I was used to ruminating on my own thoughts, but after a few minutes I was focusing quietly and with intention. Over the weeks that followed, I became better at keeping my focus on my breathing as opposed to the ideas and concepts bouncing in my head.

Today, I meditate mindfully as part of my exercise regimen. I start off with 5 minutes of meditation and then move into my strength and aerobic exercises. It feels great, and afterward I feel more able to think about and plan for the day's activities. Here's the method I use:

### **Step 1: Schedule it**

It's likely easier to schedule your mindfulness or meditation session early in the morning or later in the evening at home. You could book 30 or 45 minutes, but 15 minutes is fine. You'll want to be alert, so try to avoid scheduling a session right before bed. It might sound odd to *schedule* a session but you should think of it less as a relaxation exercise and more as an attention training activity. For your session to be most effective, you'll want minimal external distractions, and booking time off in your



calendar is a great way to tell others, and yourself, the activity has your full attention.

## **Step 2: Relax, focus, and repeat**

Find a quiet area, take a seat on the ground or on a chair, and focus your full attention on your breathing. In doing so, you'll most likely start to think of other things such as memories, things you need to pick up at the store, a funny story, feeling silly, items you need to do, and so on. Don't judge these thoughts. Just let them pass by and bring your attention back to your breathing as you slowly inhale and exhale. The act of bringing your attention back to your intended focal point is what you're exercising throughout the session, and it's the skill that will improve your ability to focus for improved productivity.

**Mindfully Productive:** for 10 *Productivity Points*, ask yourself: where and when during the week can I fit in, or try, one or more sessions of mindfulness or meditation? Once times have been identified, add these into your weekly routine.

Some suggested times include: at home in the late evening once the kids are in bed, at the park on a Sunday afternoon, on a hike in the woods in the evening, in a private room at work, or simply at your desk, assuming you won't be disturbed.

This challenge helps us to practice our focusing muscles. As with the development of any muscle, training should become a habit to achieve best results.

## What about multitasking?

With all this talk of the virtues of mindfulness and focused attention on a *single* task, what of the virtues of getting more than one thing done at the same time? Is multitasking not also a skill to have in our productivity toolbox?

Well, not according to the American Psychological Association. Their advice is clear: “*Doing more than one task at a time, especially more than one complex task, takes a toll on productivity.*”<sup>106</sup>

Why is it so detrimental? Dr. Paul Dux of the University of Queensland and his colleagues identified that our brains don’t actually multitask at all, but rather switch back and forth between performing one task and then another. While we may think this is efficient, fMRI scans reveal a whole network of frontal lobe areas of our brain that act as a form of bottleneck, severely limiting our effectiveness when attempting two tasks at once.<sup>107</sup>

Think you’re an awesome multitasker and can beat the odds? According to Dr. Anthony Wagner at Stanford University and his colleagues, for those that consider themselves heavy multitaskers, research shows all this task switching actually makes them *more* susceptible to distractions both from

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<sup>106</sup> American Psychological Association. *Multitasking: Switching Costs*. March 20, 2006. <http://www.apa.org/research/action/multitask.aspx>.

<sup>107</sup> Dux, PE; Ivanoff, J; Asplund, CL; Marois R. *Isolation of a central bottleneck of information processing with time-resolved FMRI*. *Neuron*. Volume 52. Issue 6. December 21, 2006. pp. 1109-20. <https://www.ncbi.nlm.nih.gov/pubmed/17178412>.

external stimuli and internal thoughts. As a result, the research found heavy multitaskers, in comparison with light multitaskers, were worse at being productive.<sup>108</sup>

Let's say we're working on a report and someone interrupts us for a chat. After a few moments, we turn back to the computer screen and get back to work. While we may be facing the screen, our brains don't instantly revert back to our flow state, or even our previous train of thought.

A study of Microsoft employees found that, after being interrupted by their e-mail alerts, they required up to *15 minutes* to fully return to their previous work and train of thought. This assumed that they were previously working on a single task for 5 to 30 minutes. If they were multitasking and had just spent less than 5 minutes on a single task, they had a 10% probability of not resuming the task at all within a full two hours afterwards.<sup>109</sup> These findings occurred whether the participants *even responded* to their e-mail or not.

Consider how often you check e-mail throughout the day and you can quickly see how much time your brain is spending just trying to get back to the task at hand.

Multitasking is less of an issue if what you do is routine work with low mental effort requirements, but if your work requires

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<sup>108</sup> Ophir, Eyal; Nass, Clifford; Wagner, Anthony D. *Cognitive control in media multitaskers*. Proceedings of the National Academy of Sciences of the United States of America (PNAS). Volume 106. Issue 37. September 15, 2009. pp. 15583–15587. <http://www.pnas.org/content/106/37/15583.short>.

<sup>109</sup> Iqbal, ST, Horvitz, E. *Disruption and recovery of computing tasks: Field study, analysis, and directions*. Paper for Proceedings of the SIGCHI Conference on Human Factors in Computing Systems. 2007. [http://erichorvitz.com/CHI\\_2007\\_Iqbal\\_Horvitz.pdf](http://erichorvitz.com/CHI_2007_Iqbal_Horvitz.pdf).

you to be innovative or creative, or requires you to use your full training and talents, it can take a serious hit to your daily productivity.

I know if my day is broken up into multiple segments of time due to various client meetings, my ability to work on a meaningful report is significantly decreased. In turn, if during those short segments I'm simply responding to e-mails or helping clients with smaller tasks, i.e. more routine work, it's less difficult to switch from task to task.

Management expert Peter Drucker said it well in his 1967 classic *The Effective Executive*, when he noted “*most of the tasks of the executive require, for minimum effectiveness, a fairly large quantum of time.*”

This is why flow is so important; it *takes time* to achieve. It's also why multitasking sounds good on the surface, but ends up costing us through time lost to task switching and increased distractibility.

Here are some strategies you can consider to maintain focus throughout your day:

## **1: Book your time**

Do you respond to e-mail multiple times per day? Maybe constantly every time you receive an alert? If so, try an experiment. On days where you need to work on a major report, project, or strategic activity, book a ‘no-email’ meeting in your calendar.

This sounds simple but I've seen colleagues try to establish

a rule where they will only respond to e-mail once per day at 9:00 am, or only twice per day. Though this *can* work, Outlook and many other mail applications aren't very good at accommodating your request. In other words, you'll still be shown as 'available' and e-mails will come your way, bringing with them alerts and demands for your time.

Instead, book a meeting so that people will see you're not available to respond, then *close your mail program*. You'll receive no alerts and no visual notifications. As long as clients and colleagues know they can still reach you by phone for emergencies, it's amazing the reduced number of distractions you'll receive. People understand you don't call someone during a meeting, unless it's urgent or an emergency. So take a meeting with yourself. Think about it, what meeting is more important to your organization than one that allows you to accomplish a critical high-value activity in the least amount of time? If that meeting is just you, yourself, and yours truly, so be it.

Assuming you still make time for others to book you during most days of the week, you can ensure you remain flexible enough to respond to short-term needs or urgencies while remaining highly effective with more long-term and high-value projects.

## **2: Batch your other engagements**

Do you find your week is filled with multiple meetings, leaving you with few periods of time to maintain sustained focused

attention? If so, batch your engagements as much as possible. This can include your one-on-one phone conversations, conference calls, in-person meetings with clients, roundtable discussions with your team, etc.

Assuming you're not the head of your organization, you won't have a high degree of control over meeting times, but you will have *some* control and *some* influence. Where you can, book engagements in large blocks so that you can free up larger uninterrupted sections of time for strategic work and sustained focused attention.

In my experience, a chunk of time in the morning is more valuable than a similar chunk of time in the afternoon. And so, whenever your energy and attention is highest, ensure you book this time for your most important work. If that's a meeting with colleagues, so be it. If it's sustained attention on a particular task, book it and make it sacred.

**Single-task without Distraction:** for 10 *Productivity Points*, ask:

- Do I tend to multitask during the day?
- Do I need to book any single-tasking periods for myself this week?
- Are there deliverables that require my full undivided attention to give them my best?

If you answered yes to one or more of these questions, book one

or more single-tasking sessions in the upcoming week. This may mean going to a privacy room to avoid easy access to other work items, turning off social media, turning off your personal phone, or closing your e-mail program, at least temporarily.

Multitasking sounds good on the surface, but it's actually counterproductive, increasing our distractibility and reducing flow. While it feels like we're getting more done, we're taxing our cognitive capacities by switching between tasks. To get ahead, get it done one thing at a time.

# 10

## **Productivity in Teams: Getting More Done Through and With Others**

*“I can do things you cannot. You can do things I cannot. Together we can do great things.”*

- Anon

### **Productive Conversations**

**H**ave you ever had a manager who discouraged socializing on company time? It turns out, despite what we might think, all that chit-chat supports productivity.

In a series of studies, including more than 2,500 individuals and 21 organizations, Dr. Pentland of MIT and his colleagues equipped participants with a multi-sensory wearable electronic sensor that collected data on their social behavior for weeks at



a time.<sup>110</sup>

The sensors measured how people interact, including their tone of voice, gestures, how much they talked, listened, and more. The researchers compared this data with metrics on team performance, such as client satisfaction rates, and process times, to look for correlations. Dr. Pentland and his team concluded that the best predictors of productivity were a team's *energy and engagement* in their conversations outside formal meetings...together those two factors explained *one-third* of the variations in dollar productivity among groups.”<sup>111</sup>

When the researchers identified this strong correlation, they performed a little experiment for further validation.

They advised a call center's management team to update the employee coffee break schedule so that everyone on a team took their break at the same time.

Simple enough. Though the suggestion would appear to promote *less* productivity due to increased socializing, the exact *opposite* occurred.

Processing times went down between 8 to 20%, while employee satisfaction went up in some areas by more than 10%. All in, management estimated that by implementing the practice company-wide they would forecast 15 million dollars in productivity gains.

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<sup>110</sup> Pentland, A. *The new science of building great teams*. Harvard Business Review. Volume 90. Issue 4. April 2012. pp. 60-69. <https://hbr.org/2012/04/the-new-science-of-building-great-teams>.

<sup>111</sup> Ibid.

Want to apply this in your own team? Here are some ways you can improve the energy and engagement of communications outside team meetings:

1. Attempt to co-locate team members as much as possible, and as is practical.
2. Encourage group coffee times, pot-lucks, and lunch-hour runs or jogs, or any organized sport that all members of a team enjoy.
3. Encourage managers and project leads to understand and actively use video calls as opposed to e-mails for more than simple information exchanges with remote staff.
4. Encourage staff to self-organize informal events that are open to all team members.

**Productive Conversations:** for 20 *Productivity Points*, schedule some time this week, without being too formal, to setup at least one optional activity to allow the team to spend time together in a non-meeting setting. Be sure to pencil in this activity into the shared team calendar, assuming you have one. Although it's informal, it's useful to setup a meeting invitation so that attendees remember the time and place. After all, it's easy to get caught up, especially when the event is optional. As mentioned, some examples include:

- Group coffee times
- Pot-lucks
- Lunch-hour runs, and
- Chats in a shared kitchen space or open area

Also, however makes sense, ensure the team feels it's OK to self-organize the same type of activities.

This challenge helps us to practice encouraging a little socializing on company time. It's counterintuitive but the research is clear. All of that watercooler-type chatter is actually good for business.

### **Meaning and Autonomy**

Dr. Richard Hackman of Yale and Greg Oldham of the University of Illinois, wanted to explore an age-old question of team productivity. Namely, under what conditions do team members become internally motivated to produce outstanding results? The answer to this question would provide insight into how to manage groups for optimal productivity, as well as human achievement in general.

To answer this question, Hackman and Oldham examined seven organizations, studying 658 employees who performed sixty-two different jobs. What they found, from both employees and managers, was that when employees felt *ownership* of a task or project, and when they had *autonomy* over how to achieve the objective, internal motivation was significantly

improved.<sup>112</sup>

Moreover, when tasks were *personally meaningful* and the employee could develop *mastery* through a wide use of their skills and talents, motivation was further enhanced.<sup>113</sup>

When the above factors were in place, not only were employees more motivated, they also reported greater satisfaction with their current position and career journey, both factors that contribute to long-term productivity and loyalty.

So, how can we apply this? Whether you're a leader or simply a member of a team, encouraging the following conditions has been shown to improve internal motivations and group productivity:

## **1: Encourage autonomy**

Ensure that staff executing a task or project feel ownership of the work. This means that when assigning work to someone, the assignee should decide how it should be executed and they should, in turn, be held responsible for results via their performance appraisal and through the organization's reward and recognition system. Managers can still tactfully provide guidance when solicited, or required.

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<sup>112</sup> Hackman, Richard; Oldham, Greg. *Motivation through the Design of Work: Test of a Theory*. Organizational Behavior and Human Performance. Volume 16. 1976. pp. 250-279. [http://web.mit.edu/curhan/www/docs/Articles/15341\\_Readings/Group\\_Performance/Hackman\\_et\\_al\\_1976\\_Motivation\\_thru\\_the\\_design\\_of\\_work.pdf](http://web.mit.edu/curhan/www/docs/Articles/15341_Readings/Group_Performance/Hackman_et_al_1976_Motivation_thru_the_design_of_work.pdf).

<sup>113</sup> Ibid.

## 2: Encourage purposeful mastery

Ensure that staff find their work to be personally meaningful, and that they can develop a mastery of their skills. Meaning and mastery are powerful internal motivators, but there is no ‘one-size-fits-all’ solution. Take the time necessary to identify the preferred career paths of each member of your team, ideally through one-on-one in-person conversations.

You want to know where they want to go, so that you can ensure alignment between the work that’s required and the work that each team member can perform that supports their career goals.

Preferably, a certain amount of work assigned should challenge your staff to improve their skills. If you find repetition creeping in, such as for some of your more senior staff, you may want to examine whether certain tasks can be assigned to less senior team members that wish to improve their skills.

**Encouraging Work Others’ Love:** for 30 *Productivity Points*, if you lead others, ask yourself: do I notice enthusiastic expressions when I assign tasks and projects to others? If not, you may not be tapping into the best of those around you, and they may simply be working out of duty or compliance.

Brainstorm potential changes to the work assigned for the 1-5 people for which you work most closely. Where possible, make the work individually challenging and allow the assignee to determine the method and timeframe, in consultation with you.

Discuss the work changes with each member of your team to explain how the work helps the organization move forward, and to gauge their interest. Refine your approach based on their feedback.

The benefit of this challenge is that it ensures your team is fully engaged and performing their best work. Productivity is directly correlated with an individual's sense of autonomy, purpose, and mastery. Taking the time to find challenging work for each individual is worth the effort and supports the productivity of both you and those around you.

### **Learning to Let Go: Boosting Group Productivity**

Have you ever heard the phrase, 'management doesn't trust staff'? While managers in your organization may appreciate that involving staff in decision-making and planning can make for better results, this is not always common practice.

Why is this? Research by Dr. Gretchen Spreitzer of the University of Southern California and Dr. Aneil Mishra of Wake Forest University looked to uncover the critical factors that affected management trust.

In analyzing forty-three north American firms including ninety-two business units, Spreitzer and her colleague identified several factors that work against management putting their trust in staff to support planning and decision-making. First, managers fear losing control. After all, there's no guarantee that employees will agree with management. Second, employees may behave opportunistically and not

necessarily in the interest of the organization. And third, employees receiving authority may be incompetent or ignorant.

Given these challenges, the researchers wanted to know, as a manager, how do you give control effectively?

Through their research, they identified that for trust to occur, management was required to take the first step and first believe that employees are reliable, honest, and care about the goals of the organization. Further, management needed to believe that staff are competent, when given the right information, to make decisions that are good for the organization.<sup>114</sup>

What Spreitzer and Mishra found was that when (a) managers *decided to change their beliefs* to align with those above, (b) when they established performance incentives that aligned employee interests with those of the organization, and (c) when they were transparent with employees about their performance, managers became more trusting of staff and more willing to include them in decision-making.

Further, when these conditions were in place, they *all* positively affected company performance, whereas the simple act of management trusting staff produced “the highest magnitude effects”<sup>115</sup> in performance.

Further, trust between staff and management is a key component of group productivity. Research by Dr. Dale. E. Zand

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<sup>114</sup> Spreitzer, Gretchen M; Mishra, Aneil K. *Giving up control without losing control: Trust and its substitutes' effects on managers' involving employees in decision making*. Group and Organization Management. Volume 24. Issue 2. 1999. pp. 155-187.

<sup>115</sup> Ibid.

of Cornell University found that, in comparison with low-trust groups, high-trust groups were more effective at clarifying goals, seeing the reality of information shared, understanding the scope of search for solutions, and appreciating the true commitment of managers in implementing solutions.<sup>116</sup>

**Collective Decision-Making:** for 20 *Productivity Points*, if you lead others, ask yourself: do I allow non-managers to participate in the planning and decision-making of my organization? If not, why not? When trust is in place between managers and staff, these actions have been proven to increase organizational performance.

So, what can you do to encourage this among your staff? At the next planning session, encourage anyone on the team to attend, if interested. If sensitive topics will be discussed, e.g. human resource issues, schedule these topics to occur at the beginning of the meeting and invite any staff for the remaining period of time.

By taking on this challenge, you'll be encouraging greater work satisfaction among staff as well as more-informed decision making. A little trust goes a long way.

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<sup>116</sup> Zand, Dale E. *Trust and Managerial Problem Solving*. Administrative Science Quarterly. Volume 17. Issue 2. June 1972. pp. 229-239.  
[http://www.jstor.org/stable/2393957?seq=1#fndtn-page\\_scan\\_tab\\_contents](http://www.jstor.org/stable/2393957?seq=1#fndtn-page_scan_tab_contents).



# 11

## The Science of Meetings

*“If you had to identify, in one word, the reason why the human race has not achieved, and never will achieve, its full potential, that word would be ‘meetings’.”*

- Dave Barry, author and columnist

### A Meeting of Minds

**W**hen you think of ‘biggest waste of time’, what comes to mind? One meta-study of meetings, performed jointly out of the Universities of Tulsa and Arizona, concluded: *“...several decades of studies reveal meetings are indeed very costly in both terms of money and time. Studies also reveal that*

*in general meetings are unproductive and wasteful.”*<sup>117</sup>

This would be sad enough, if meetings were a minor inconvenience, but this is often not the case. In one study of middle managers, it was shown that meetings took up approximately 35 percent of their workdays,<sup>118</sup> whereas in a separate study of top executives, it was up to 60 percent.<sup>119</sup> Perhaps more troubling, in a survey of 1,900 business leaders, 72% indicated they spent more time in meetings today than they did five years ago, and more than 49% expected time in meetings to increase.<sup>120</sup>

There is a silver lining, however. Joseph Allen of the University of Nebraska and his colleagues note that “ineffective meetings are a cost that an organization arguably has the greatest opportunity to control.”<sup>121</sup>

In a study of meeting design by Desmond Leach of Leeds University and his colleagues, they found that the simple use of meeting agendas, and consideration of the quality of meeting

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<sup>117</sup> Romano, Nicholas C; Nunamaker, Jay F. *Meeting Analysis: Findings from Research and Practice*. Proceedings of the 34th Hawaii International Conference on System Sciences. 2001. p. 11. [https://www.researchgate.net/profile/Nicholas\\_Romano4/publication/3889414\\_Meeting\\_Analysis\\_Findings\\_from\\_Research\\_and\\_Practice/links/54db8e600cf28d3de65ba970/Meeting-Analysis-Findings-from-Research-and-Practice.pdf](https://www.researchgate.net/profile/Nicholas_Romano4/publication/3889414_Meeting_Analysis_Findings_from_Research_and_Practice/links/54db8e600cf28d3de65ba970/Meeting-Analysis-Findings-from-Research-and-Practice.pdf).

<sup>118</sup> Ibid.

<sup>119</sup> Bandiera, Oriana; Guiso, Luigi; Prat, Andrea; Sadun, Raffaella. *What Do CEOs Do?* CEPR Discussion Paper No. DP8235. February 2011. [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=1758445](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=1758445).

<sup>120</sup> Allen, Joseph A; Rogelberg, Steven G; Scott, John C. *Mind Your Meetings: Improve Your Organization's Effectiveness One Meeting at a Time*. Quality Progress. Volume 41. 2008. pp. 48-53. <http://digitalcommons.unomaha.edu/psychfacpub/93/>.

<sup>121</sup> Ibid.

facilities, supported greater meeting effectiveness. Also, it was found that as meeting size increased, attendee involvement decreased.<sup>122</sup>

As per the work of Daniel Rice of Syracuse University and his colleagues, they identified that virtual meetings (e.g. video or teleconference) were optimal when they were more structured, whereas in-person meetings could be less structured and were more effective when discussion-intensive.<sup>123</sup>

Finally, if you've ever felt a meeting was a little less boring, if only because you were called upon to complete a task during the meeting, you're not alone. In a study by Dr. Dan Ariely of Duke University and his colleagues, they asked participants to perform a variety of simple tasks, from assembling IKEA boxes, to folding origami, and building sets of Legos. They found that the labor required to complete these tasks contributed to their enjoyment, but *only* when labor resulted in successful completion of a task.<sup>124</sup> This finding complements past research in behavioral psychology by Dr. Leon Festinger of

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<sup>122</sup> Leach, DJ; Rogelberg, SG; Warr, PB. *Perceived Meeting Effectiveness: The Role of Design Characteristics*. Journal of Business Psychology. Volume 24. Issue 1. 2009. pp. 65-76. <https://link.springer.com/article/10.1007/s10869-009-9092-6>.

<sup>123</sup> Rice, DJ; Davidson, BD; Dannenhoffer, JF; Gay, Geri K. *Improving the Effectiveness of Virtual Teams by Adapting Team Processes*. The Journal of Collaborative Computing and Work Practices. Volume 16. Issue 6. 2007. pp. 567-594. <https://link.springer.com/article/10.1007/s10606-007-9070-3>.

<sup>124</sup> Norton, Michael I; Mochon, Daniel; Ariely, Dan. *The IKEA Effect: When Labor Leads to Love*. Journal of Consumer Psychology. Volume 22. Issue 3. July 2012. pp. 453-460. <https://dash.harvard.edu/handle/1/12136084>.

Stanford that indicated “the more effort people put into some pursuit, the more they come to value it.”<sup>125</sup>

Based on the research above, here are some simple tips to make the most of your meetings:

## **1: Always send an agenda**

Even if you don’t have the details, just send out three bullets in the meeting invitation summarizing the key points of discussion. The agenda helps participants immensely in knowing why they need to be there, and what they should plan to contribute. If you don’t send an agenda, you won’t be getting the most out of your attendees. Also, you may get less attendance. If you just want to share information in a one-way manner, send an e-mail. If you need to include documents to provide details, reference these with links from your e-mail and follow-up later to answer any questions.

Having an agenda is important for recurring meetings where for a given week or period it can be more ambiguous why you’re meeting.

## **2: Consider meeting facilities**

Recently, I was organizing a process improvement event with my colleague. For one session, we held it in a boardroom that

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<sup>125</sup> Festinger, L. *A theory of cognitive dissonance*. 1957. Stanford University Press.  
<http://psycnet.apa.org/index.cfm?fa=search.displayRecord&uid=1993-97948-000>.

was dark, cold, and had an imposing oval-shaped table with garbage on the floor from a previous meeting. In the next session, we held it in a bright, open room with a wall full of windows, a large modern video screen, and a u-shaped table formation so that everyone could easily face each other without any ‘us vs. them’ chair positions.

As you might imagine, the quality of both the conversation and ideas was noticeably better in the second session, despite having the exact same content and agenda. Key lesson: pick the right facilities for your type of meeting.

### **3: Consider member contributions**

If you just need to come to a consensus on a clear decision, you can afford to have a larger group. If instead you need participants to help you review a document in detail, or to provide concrete suggestions, then smaller is generally better.

There is one exception. If you can facilitate your meeting so that the action portion allows members to break out into smaller groups, e.g. 5-7 per table, then you can get away with a larger meeting. Be careful though. Once you re-group to the larger group, voluntary attendee participation may decrease.

### **4: Accommodate remote attendees**

Sometimes the fact that a few attendees are in other time zones can be overlooked. Consider that, even if others around the world are currently at work, they may have just arrived at work,

or are just about to leave. Try to set your meetings for a time that allows for some room for everyone if the meeting runs late. You don't want those in another time zone to miss their family dinner because your mid-afternoon meeting went a bit over.

Also, have someone check, and double check, the audio and video equipment before the call. Faulty technology is a big time waster when the meeting organizer needs to fiddle with buttons and settings.

If your meeting will not be face-to-face (e.g. teleconference) you'll want to increase the level of structure to keep participants on track. This means having a clear agenda and sticking to it. This also means summarizing next steps so that everyone is on the same page. When on the phone, you miss a lot of the body language that show whether individuals have understood their roles and are accepting of next steps. Given this, if videoconferencing is an option, it's preferable to a phone call but ensure all participants are familiar with the setup required and test with a colleague beforehand.

## **5: Encourage contributions**

The best meetings are those where all participants are providing input to solve a challenging problem or contributing suggestions to develop a solution. You can encourage active contribution by stating this desire at the beginning of a meeting, allowing time for it during the meeting, and encouraging those that haven't spoken to share their thoughts.

There's no harm in calling on someone for their opinion in a

meeting in which they were specifically invited to attend. It shows you value their opinion and time commitment.

**Smart Meetings:** for 20 *Productivity Points*, if you're a leader, ask yourself: am I implementing all of the 'smart meeting' productivity strategies for the meetings I organize? If not, take some time to update preparatory documents and logistics for your next meeting, and see if the changes lead to a better outcome.

### A Word on Crunch Time

If you're a leader, have you ever wondered if setting ambitious or tight deadlines increases worker productivity?

According to Towers Watson survey of over 22,000 workers in twelve countries, 57% of employees who claimed to work under these conditions felt less productive and *disengaged* from their work.<sup>126</sup>

In other words, crunch time makes people want to step away, not lean in. This is further evidenced in the data which shows subsequent higher absenteeism.<sup>127</sup>

And engagement is the magic word. Research by economists at the University of Warwick shows that engaged

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<sup>126</sup> Towers Watson Global Benefits Attitude Survey. *Workplace stress leads to less productive employees*. September 3, 2014. <https://www.towerswatson.com/en/Press/2014/09/Workplace-stress-leads-to-less-productive-employees>.

<sup>127</sup> Ibid.

workers show a 12% increase in productivity.<sup>128</sup>

But, you might argue, doesn't the intense 'crunch' period allow workers to complete more work in less time? It sounds logical, but research shows that just having a *sense* of overload of work for a temporary period of time decreases productivity.<sup>129</sup> The takeaway is to be careful about tight deadlines. Giving others an ambitious target is one thing, but make sure it's realistic given current commitments and priorities. If you're not sure if it is, just ask those that have done it before. Your team will thank you.

**Avoid the Crunch:** for 10 *Productivity Points*, if you lead others, take a few minutes to think of a goal you've set for others where you intentionally made it ambitious in the hope that it motivated others to do more. Think back to the sentiments felt by those doing the work at the time. Were they enthusiastic, creative, and innovative, or did they put their 'nose to the grindstone' to get it done for you on time. Did you get the best outcome you could have wanted? If not, modify your approach for the next goal.

This challenge helps us to get out of the habit of using ambitious targets on others, a practice that is not the

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<sup>128</sup> Oswald, Andrew J; Proto, Eugenio; Sgroi, Daniel. *Happiness and productivity*. Journal of Labor Economics. Volume 33. Issue 4. 2015. pp. 789-822.  
<https://www.econstor.eu/bitstream/10419/35451/1/522164196.pdf>.

<sup>129</sup> Ibid.



productivity booster we may think. Realistic targets are the preferred approach for optimal productivity.

# 12

## Be Productive by Being Nice

*“There is, I believe, in every disposition a tendency to some particular evil, a natural defect, which not even the best education can overcome.”*

– Elizabeth Bennett, protagonist of  
Jane Austen’s *Pride and Prejudice*

### Some Particular Evil

**W**hen we think of improving our productivity, examining our character may not be the first thing that comes to mind. It turns out, however, that good character plays an important role in our productivity.

But, before we get to what makes us good, let’s look at what makes us bad. Psychologists have a funny word for those of us

that are particularly bad. They possess what is referred to as the *Dark Triad*. According to Dr. Scott Barry Kaufman, professor of psychology at NYU, and his colleagues, this includes:

- Psychopathy: being genuinely insensitive to others' feelings, as well as the morality of one's actions.
- Narcissism: being highly self-seeking and wanting others to recognize one's importance.
- Machiavellianism: manipulating and exploiting others to further one's own goals.<sup>130</sup>

Do you know anyone like this in your work or personal life? I would hazard a guess they're not that fun to be around, regardless of whether they're good at what they do.

Fortunately, it's not necessary to stoop to the depths of others to get ahead. It turns out we can be even more productive by being good.

## Honesty and Humility

In a study out of Purdue University that asked participants to find ambiguous relationships between three separate numbers, it was identified that more humble participants

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<sup>130</sup> Jonason, PK; Kaufman, SB; Webster, GD; Geher, G. *What lies beneath the Dark Triad Dirty Dozen : varied relations with the Big Five*. Individual Differences Research. Volume 11. Issue 2. 2013. pp. 81-90. <http://scottbarrykaufman.com/wp-content/uploads/2013/08/jonason-et-al-2013.pdf>.

performed more information search and were overall more efficient at identifying solutions.<sup>131</sup>

Furthermore, in a study from Baylor University on the links between employee behavior and personality, it was found that honesty and humility were linked not only with better job performance but also with greater recognition by one's manager.<sup>132</sup>

In fact, honesty and humility as a character trait was more positively related to job performance than all other factors examined, including extraversion, emotionality, agreeableness, openness to experience, and conscientiousness.

While honesty involves integrity and truthfulness, humility is more complex and involves the ability to acknowledge personal limits, to be open to advice from others, to keep one's accomplishments in perspective, to have low self-focus, and to appreciate others.<sup>133</sup>

Dr. Dusya Vera, of the University of Houston, and her colleague posit that humility holds such great value as it makes us more open to new ideas, to learning from others, and often includes acknowledging and learning from our limitations, as

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<sup>131</sup> Weiss, Howard M. *The utility of humility: Self-esteem, information search, and problem-solving efficiency*. *Organizational Behavior and Human Performance*. Volume 25. Issue 2. April 1980. pp. 216-223. <http://www.sciencedirect.com/science/article/pii/0030507380900641?via%3Dihub>.

<sup>132</sup> Johnson, Megan K; Rowatt, Wade C; Petrini, Leo. *A new trait on the market: Honesty-Humility as a unique predictor of job performance ratings*. *Personality and Individual Differences*. Volume 50. 2011. pp. 857-862. <https://www.researchgate.net/publication/251531345>.

<sup>133</sup> Snyder, CR; Lopez, SJ. *Handbook of positive psychology*. 2002. pp. 411-419. Oxford University Press.

well as a desire to develop others. All factors which support personal and organizational productivity.<sup>134</sup>

### **Self-Sacrifice**

When you think of self-sacrifice, do you think of the Hollywood hero or heroine who puts their life on the line to save others around them? It turns out, perhaps not surprisingly, self-sacrifice doesn't need to be this extreme to be effective. A little sacrifice goes a long way.

In a series of experiments by Dr. Barbara van Knippenberg, of Vrije Universiteit in Amsterdam, and her colleague, they identified that a leader's self-sacrificing behavior had a significant effect on motivating subordinates to higher levels of productivity. Moreover, the less the leader was a prototypical example of other members of the group (i.e. perceived as an outsider) the *more* effective self-sacrifice became.<sup>135</sup>

So, what constitutes a sacrifice? In one study by Knippenberg, the simple act of the leader joining in other members of their team in an idea generation exercise, above and beyond their regular leadership duties, was enough to push team members to boost their performance.

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<sup>134</sup> Vera, D; Rodriguez-Lopez, A. *Strategic Virtues: Humility as a Source of Competitive Advantage. Organizational Dynamics*. Volume 33. Issue 4. 2004. pp. 393-408. [https://www.researchgate.net/publication/247142425\\_Strategic\\_Virtues](https://www.researchgate.net/publication/247142425_Strategic_Virtues).

<sup>135</sup> Van Knippenberg, B; Van Knippenberg, D. *Leader self-sacrifice and leadership effectiveness: the moderating role of leader prototypicality*. *Journal of Applied Psychology*. Volume 90. Issue 1. 2005. pp. 25-37. <https://www.researchgate.net/publication/8089235>.

## Positivity

While a positive outlook on life has been clearly shown in numerous studies to increase one's life satisfaction<sup>136</sup>, less is known regarding its effect on group productivity.

However, in one study of over 230 employees by Doctor Stefano Livi of the University of Rome and his colleagues, it was found that not only did positive employees improve organizational productivity, they also had a neutralizing effect on the negativity of others around them.<sup>137</sup> The researchers believe this effect likely occurs given that positive employees are better able to manage stress and difficult situations, giving them greater personal resources to invest in their work.<sup>138</sup>

## Emotional Intelligence

Emotional intelligence (EI) is generally the capability of individuals to recognize their own and other people's

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<sup>136</sup> Caprara, GV; Steca, P; Alessandri, G; Abela, JR; McWhinnie, CM. *Positive orientation: Explorations on what is common to life satisfaction, self-esteem, and optimism*. Epidemiology and Psychiatric Sciences. Volume 19. Issue 1. March 2010. pp. 63-71. <https://www.researchgate.net/publication/44615099>.

<sup>137</sup> Livi, S; Alessandri, G; Caprara, GV; Pierro, A. *Positivity within teamwork: Cross-level effects of positivity on performance*. Personality and Individual Differences. Volume 85. 2005. pp. 230-235. <https://www.researchgate.net/publication/277338576>.

<sup>138</sup> Ibid.

emotions.<sup>139</sup> According to Daniel Goleman, originator of the concept of EI, through his research at over 200 global firms, it was concluded that “truly effective leaders are distinguished by a high degree of emotional intelligence.”<sup>140</sup>

In one study of 358 randomly selected managers at Johnson & Johnson, it was discovered that a high rating in EI was closely linked with superior performance on the job.<sup>141</sup> In a separate UK study of 224 managers out of the University of Hertfordshire, it was identified that managers with high EI had less stress, better health, and demonstrated superior work performance.<sup>142</sup>

Finally, in a year-long study of financial advisors by Dr. Frederic Luskin of Stanford and his colleagues, it was found that emotional intelligence training contributed on average a “60%-400% improvement in productivity, which led to an average increase in sales of 25%.”<sup>143</sup> Further, participants demonstrated reduced stress levels as well as increased

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<sup>139</sup> Coleman, Andrew. *A Dictionary of Psychology*. Third Edition. 2008. Oxford University Press. <http://www.oxfordreference.com/view/10.1093/acref/9780199534067.001.0001/acref-9780199534067>.

<sup>140</sup> Goleman, Daniel. *What Makes a Leader?* Harvard Business Review. January 2004. <https://hbr.org/2004/01/what-makes-a-leader>.

<sup>141</sup> Cavallo, Kathleen; Brienza, Dottie. *Emotional competence and leadership excellence at Johnson & Johnson*. Europe's Journal of Psychology. Volume 2. Issue 1. 2006. <http://ejop.psychopen.eu/article/view/313/html>.

<sup>142</sup> Slaski, M; Cartwright, S. *Health, performance and emotional intelligence: an exploratory study of retail managers*. Stress and Health. Volume 18. Number 2. April 1, 2002. pp. 63-68. [http://www.ingentaconnect.com/content/jws/smi/2002/00000018/00000002/art00926#aff\\_1](http://www.ingentaconnect.com/content/jws/smi/2002/00000018/00000002/art00926#aff_1)

<sup>143</sup> Luskin, R; Aberman, R; DeLorenzo, A. *The training of emotional competence in financial advisors*. Issues in Emotional Intelligence. 2005. [http://www.eiconsortium.org/reports/emotional\\_competence\\_training\\_financial\\_advisors.html](http://www.eiconsortium.org/reports/emotional_competence_training_financial_advisors.html).

quality of life.

**A Productive Character:** for 20 *Productivity Points*, ask yourself the following questions and reflect on your responses.

**1: Honesty**

Was I truly honest with those I interacted with today? This week?

**2: Humility**

Have I been open to and appreciative of the advice given by others this week? By my spouse or partner? By my family or friends? By my superiors? By my peers or subordinates?

**3: Being nice**

Have I demonstrated recognition or appreciation for the accomplishments, large and small, of my spouse or partner? Of my family members? Of my friends? Of my superiors, peers, or subordinates?

**4: Self-Sacrifice**

What other-focused actions have I taken this week to demonstrate to others my commitment to the organization I work for, or lead?



## **5: Positivity**

What was the best thing that happened to me so far this week?  
What am I grateful for this week? What am I looking forward to today at work, and at home?

## **6: Empathy (part one)**

Have I said something today to my superiors, peers, subordinates, friends, spouse, or family members that could have offended them?

## **7: Empathy (part two)**

Are others around me going through difficult times? How can I show understanding and tactfully offer my support without unsolicited advice?

In short, we can be more productive by being better people. And by better, this means: more honest, humble, self-sacrificing, positive, and empathetic. Not only do we gain productivity, but we also become healthier and less stressed. All of us have the ability to improve our character; it just takes self-examination and a willingness to change.

# 13

## The Science of Productive Influence

*“The key to successful leadership today is influence, not authority.”*

- Ken Blanchard, author and management expert

### Remove the Dissonance

**B**ack in the late 1950's, American social psychologist Leon Festinger published what would become his seminal work. *A Theory of Cognitive Dissonance*. In his publication, he explained a truth both simple and profound: *“The existence of dissonance, being psychologically uncomfortable, will motivate [a] person to try to reduce the dissonance and achieve consonance. When dissonance is present, in addition to trying*

*to reduce it, [a] person will actively avoid situations and information which would likely increase the dissonance.”<sup>144</sup>*

Festinger observed that when our behaviors did not match with our beliefs, we would be compelled to act in one of three ways. Namely, we would:

1. Change our belief,
2. Change our actions, or
3. Change our perception about our actions.

All of these steps were to bring back alignment (or consonance) between our beliefs and actions.<sup>145</sup> For example, let’s say I want to buy a fuel-efficient car given my concern for the environment.

I live too far from public transit, so I buy one that runs on ‘clean diesel’ on the promise that it has a low impact on the environment. I later discovered that the company promising ‘clean diesel’ faked the emissions numbers to boost sales and the car I bought is not actually as fuel efficient as originally claimed. This is the exact situation that occurred with the Volkswagen emissions scandal in 2005.<sup>146</sup>

At this point, I experience cognitive dissonance. I still care about the environment but now I’m driving a car that is worse

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<sup>144</sup> Festinger, L. *A Theory of Cognitive Dissonance*. Stanford University Press. 1957. p. 3.

<sup>145</sup> Ibid.

<sup>146</sup> Wikipedia. *Volkswagen Emissions Scandal*. Accessed April 12, 2017. [https://en.wikipedia.org/wiki/Volkswagen\\_emissions\\_scandal](https://en.wikipedia.org/wiki/Volkswagen_emissions_scandal).

for the environment than many other cars on the road. What do I do? I can change my belief about the impact my car has on the environment (“maybe car pollution isn’t the real problem I need to worry about”), I can change my actions (“I’m selling my car”), or I can change my perception about my actions (“I’m driving my car, but only until a more fuel efficient one enters the market in my price range.”).

Given this phenomenon, recognize that if you want someone to take action in a certain way (e.g. to donate to a worthy cause, to be more action-oriented, to try your product or service, etc.) and they are not already doing so, you must first *change their belief* about what that action means to them. We act in ways that give us consonance with our beliefs. Consider:

1. What is the pain you are helping them avoid?
2. What is the pleasure or satisfaction you are helping them gain?
3. Why should they believe what you say is true?
4. How can you reassure them that after they buy into your idea or product they won’t be disappointed?

If you don’t provide your audience with sufficient reason to believe in your product or idea, they will simply ignore it or attempt to avoid your message to remove any dissonance with

existing beliefs. This is why ‘cutting through the noise’<sup>147</sup> can be so hard when we don’t first know what someone believes about us, our ideas, our products, and services. The best way to find out someone’s beliefs is to simply and politely ask.

If you’re trying to influence others, and you’re rejected, don’t take it personally. Others aren’t necessarily rejecting you, they’re just trying to avoid the dissonance of acting in a way that disagrees with their current beliefs. Some tips to consider:

### **1. Ask, then speak**

If you’ll be giving a presentation to others regarding some form of change (e.g. community, organizational, etc.) find out before the meeting how they currently feel about the situation. Going in blind and simply presenting your message could be disastrous if it directly contradicts what others believe. For example, stating in so many words that ‘everything is on track’ when staff feel it’s very much ‘off track’ is probably not the best approach. Recognize what others currently believe and state this to show you understand, then turn them around tactfully with evidence.

### **2. No direct attacks**

When you want to change someone’s behavior to try an idea,

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<sup>147</sup>

avoid immediately arguing against a competing idea, especially if one of these ideas is what most of your audience believes. Your audience may be turned off and will likely ignore your message. Instead, focus on communicating why your idea is excellent at meeting their needs, as well as why your audience can trust what you say is true.

### **3. Dig deeper to understand**

If you recognize that others are performing counter-productive behaviors, it may be due to the consonance they achieve from rationalization. For example, let's say you identify that one of your colleagues is using a workflow that is highly inefficient. At the same time, they tell you 'It's ok' even though they're often frustrated. When someone is behaving oddly, you may wish to ask yourself:

1. Why might they not want to change their behavior?
2. What might they gain from believing what they do?
3. How can I share my idea in a way that lets them 'save face'?

### **Putting Your Foot in the Door**

In 1966, Johnathan Freedman and Scott Fraser of Stanford showed that once an individual has committed to a small request, they are more likely to follow through with a larger, related request. They dubbed this phenomenon, the *Foot-in-*

*the-Door* (FITD) technique.<sup>148</sup>

The study demonstrated that if we wish to influence others to take large actions (e.g. stop smoking, switch brands, try our services or support a risky idea, etc.) that it is best to start them with small commitments and build from there. As the commitments increase over time, individuals increase their cognitive dissonance with saying no to a similar or related larger request. This phenomenon holds true even when the subsequent request occurs days after the initial request.

### **A Nudge Toward Greatness**

One of the more productive strategies to encourage others to make large changes is asking *nudge questions*.

As David Sprott and others have observed through an examination of various studies over the decades, “*Researchers have consistently shown that questioning people about a future behavior influences the subsequent performance of that behavior...these researchers formally adopt a common label – the question-behavior effect.*”<sup>149</sup>

In a notable demonstration of this effect, it was observed by researchers Jack Feldman and John Lynch in the 1980’s that when we are asked to consider an answer to a leading question

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<sup>148</sup> Freedman, Jonathan L; Fraser, Scott C. *Compliance without pressure: the foot-in-the-door technique. Journal of personality and social psychology.* Volume 4. Issue 2. 1966. pp. 195-202. [http://www.demenzemedicinagenerale.net/images/mens-sana/Foot\\_in\\_the\\_door\\_technique.pdf](http://www.demenzemedicinagenerale.net/images/mens-sana/Foot_in_the_door_technique.pdf).

<sup>149</sup> Ibid.

(e.g. “Would you say you recycle often?”) this affected our future attitudes toward the topic, in the direction in which the subject was presented. The researchers observed, “*Belief, attitude, or intention can be created by measurement if the measured constructs do not already exist in long-term memory. The responses thus created can have directive effects ...*”<sup>150</sup>

This implies that if we wish to influence others to commit to a certain cause or idea, that we encourage them to reflect on questions that address it in a specific direction. For example, let’s say I want to encourage staff to donate to a work charity for colon cancer research. I may send out an e-mail message that includes information about the charity, as well as a 5-minute survey that I encourage them to complete so that the organization can learn more about how best to manage this year’s campaign. In the survey, I can include a question that asks: “*Do you plan to donate to the campaign in the next three to six months?*” or more generally “*Do you support the objective to increase staff contributions for the current year’s campaign?*” Not only do these questions encourage the behavior we wish to see in others, but also asking questions before proposing solutions is just good practice for reducing dissonance.

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<sup>150</sup> Feldman, Jack M; Lynch, John G. *Self-generated validity and other effects of measurement on belief, attitude, intention, and behavior*. Journal of applied Psychology. Volume 73. Issue 3. 1988. pp. 421-434. <https://www.researchgate.net/publication/240233682>.



**The Big Request Challenge:** for 10 *Productivity Points*, take ten minutes, to think about a large action or task you'd like your colleagues, family members, or clients to take. Ask yourself:

1. What small, simple, low-effort commitment(s) can I start with to get them on the right track?
2. What subsequent request(s) would I make to achieve the end result?
3. What *nudge questions* can I ask them?

This challenge helps us practice the science and art of persuasion. Although there is solid research behind these concepts, individuals are complex and so applying these techniques effectively will take practice.

In summary, we can help others to get significant feats accomplished by encouraging them first to take small, simple steps in the direction of their later commitment. Once others commit to small acts in a particular belief mindset, cognitive dissonance encourages consistent follow-through to larger related tasks. Nudge questions can further motivate others to consider avenues that support this journey.

## Give Before Asking

The *Law of Reciprocity* states that we are generally compelled to repay others, in kind, for what they have done for us.<sup>151</sup> The implication is that if we wish to have support for our ideas from others, we should first take the attitude of serving others.

In the famous *Reciprocation-Coke Study*, Dennis Regan of Cornell University demonstrated that the simple act of giving someone a low-cost soft drink was enough to increase others' liking of the person *and* increase their willingness to support later requests.<sup>152</sup>

This is somewhat counterintuitive as one might assume we should simply ask first for commitment as this requires less effort on our part. The *Law of Reciprocity*, however, states that we *first* commit to serve others.

We should be cautious, though, to avoid the belief that we should serve others *so that* they serve us. With this attitude, you will likely be left disappointed when someone inevitably shows no reciprocity for your efforts. As a result, you may become confused, frustrated, and demotivated in your endeavors.

Instead, take on an attitude of serving others, *even when they have not served us and even knowing they may never serve us*, as this is much more likely to help you achieve your goals. And,

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<sup>151</sup> Cialdini, Robert. *Influence: The Psychology of Persuasion*. 2006. Harper Business.

<sup>152</sup> Regan, Dennis T. *Effects of a favor and liking on compliance*. Journal of Experimental Social Psychology. Volume 7. Issue 6. 1971. pp. 627-639.  
<http://www.sciencedirect.com/science/article/pii/0022103171900254>.

even when the *Law of Reciprocity* does not hold, you can take comfort that you have helped others to achieve their goals.

Let's try this out. Can you think of a situation where you've been asking someone else to do something (e.g. put down the toilet seat, submit their time report at the end of the day, etc.) but they keep ignoring or avoiding your requests?

If so, it's likely your demands are creating dissonance in others. Before someone complies, you first need to remove their dissonance. What pain do they associate with doing what you ask? If you're not sure, ask someone who knows them, or if it's truly important, ask them directly.

In turn, ask them what they gain from not doing what you ask. This question may be sensitive and so you may wish to only ask someone who knows them well, or to infer this from their behavior. If they're not acting as you would prefer, they're likely associating too much pain to doing what you request, and too much enjoyment to avoidance.

Again, turn the dissonance on its head. The next time you ask them to comply, kindly state a few reasons why you think *not doing it* would not be in their interest (don't include threats though!) and explain a few reasons why doing it would be enjoyable or beneficial for them.

If all goes well, you'll have successfully explained to them why *not acting* is more psychologically discomforting than simply acting.

Don't stop there, however. Another issue may be that the non-complying person *still* feels that complying is just too painful. In this case, use the *Foot-in-the-Door* (FITD) technique

to your advantage. If you receive time reports days after they're due, instead of asking someone to always submit their time report at 6pm, ask that they submit them to you within 48 hours. Then, once you see they can effectively comply, ask for within 24 hours, then by end of day, etc.

**Productive Reciprocity:** for 10 *Productivity Points*, take ten minutes to think about what you can give others, *without any expectation of a return*. Would it be:

- Free information you know is of value to others?
- A free service to others?
- A free item? Or
- A free word of encouragement or a helping hand?

Once you have the gift identified, plan to give it away. A simple challenge, but highly powerful.

In summary, the law of reciprocity explains that if we wish to be more productive from the help of others, we should first aim to serve others in a similar way. The key is to serve before asking, to serve even if others have not helped us, and to serve even when there's no expected return. Our attitude toward giving is just as important as the giving itself.

# 14

## Streamlining Your Work and Life

*“I should estimate that in my experience most troubles and most possibilities for improvement add up to the proportions something like this: 94% belongs to the system ..., 6% special.”*

- Edward Deming, American engineer, statistician, professor, author, lecturer, and management consultant

### **Being Productive by Being Lean**

In elementary school, I started a small lawn-cutting business named ‘Mighty Mowers.’ The work flow was simple:

- Step 1: Create paper flyers on my printer.
- Step 2: Distribute flyers to doorsteps.
- Step 3: Client calls me (if interested).
- Step 4: Client informs me of when to come over to work.
- Step 5: Cut their lawn.
- Step 6: Client reviews my work.
- Step 7: If they feel I did well, they pay me. If not, go to Step 5.
- Step 8: I thank the customer for their business.
- Step 9: I deposit my spoils in the bank.
- Step 10: I buy more paper and printer ink at the store.

After step 10, go back to Step 1. Repeat. Repeat. Repeat.

There was one little snag, however. Yes, I was an entrepreneur. Yes, I was ‘my own boss.’ But, I was working like *crazy*. I was working harder than my friends that delivered flyers.

I was taking home a bit more money than my friends at the end of the week, but only because I was working *a lot* more hours. Truth be told, I hadn’t created a business, I had created a job. I wasn’t working on my business. I was working in it.

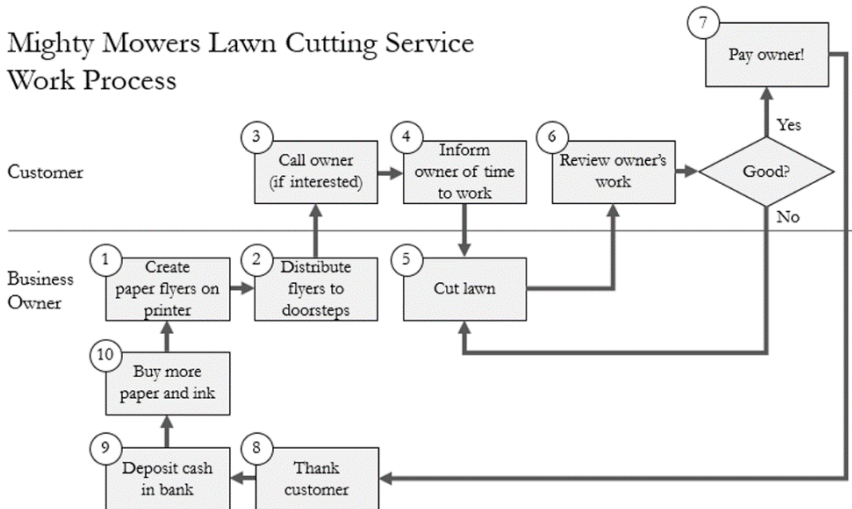
Upon realizing I was running myself ragged, I took a pause one afternoon between cuts and thought about what I had done.

I had designed a job with no steady income, and no time to play with my friends.

I thought about what I was doing and considered visualizing my process, in case I was missing something I had overlooked. At the time, I put my process to paper by drawing a bunch of

messy boxes and arrows with a ball-point pen.

### Mighty Mowers Lawn Cutting Service Work Process



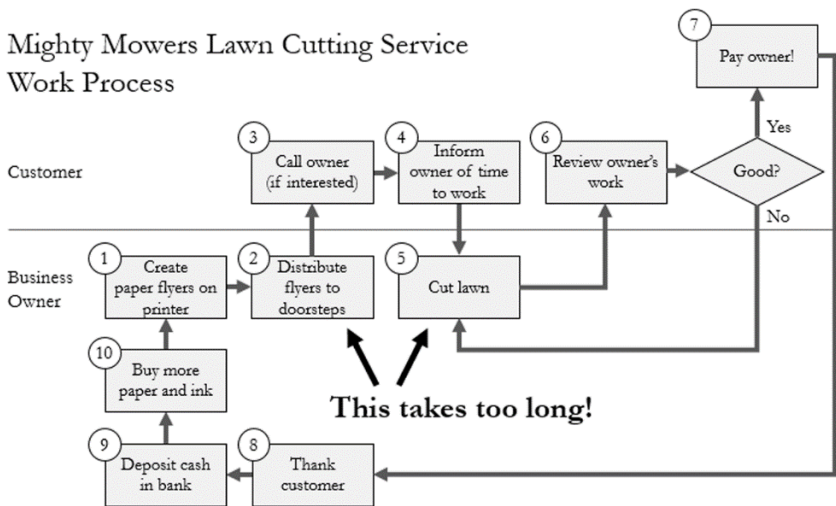
After having written my ‘secret formula’ to paper, I stared at it over a bag of chips. The system worked (i.e. it made money) but it depended on *me* to work it. I clearly saw if I wanted to increase my revenue, I would just need to work *faster*. Unfortunately, that wasn’t an option as I was often exhausted. So, I decided to take a different approach.

Instead of focusing on what my system was *doing*, I asked what it was *producing*. I figured, and knew from experience, my clients didn’t care how much sweat or time I put into cutting their lawn, or how many times I scratched my legs on thistle bushes, or how tired I was at the end. They just opened their doors, took a 5-second check, and then, if they were pleased, paid me. They only cared about the end result, the value they received for their \$5. In this case, a nice lawn.

With this in mind, I looked back at my scribbles and it began

to sink in more and more with every potato chip I crunched: *the business wasn't about my effort*, it wasn't even *about me*. It was about a nice lawn. *Mighty Mowers* isn't *me*, it's a system. I'm just playing a role in the system. Anyone could do my role with the right training.

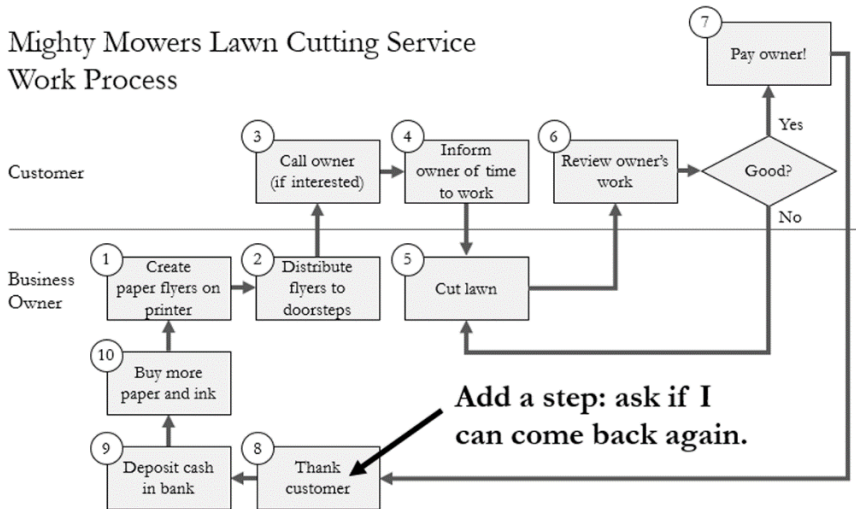
Immediately, I made a few changes. First, I asked some friends if they wanted to make money without having to distribute newspapers. They joined in a heartbeat. Next, I stepped back and decided to focus on training the new recruits on how to follow the system. Finally, I looked at the system and asked if I could make it better.



By looking at the system as a whole, I saw that Step 2 ("Distribute flyers to doorsteps") was taking just as long as cutting a few lawns (Step 5), but only a small fraction, maybe 2 out of the 100 families on my street, would call me to book a cutting each time I distributed flyers. Could I reduce the



necessity of this time-consuming step?



I realized that I was foolishly just thanking existing customers at the end, when I should have also been asking if they wanted me to come back in two weeks, about the time it took for their lawns to get scraggly again. The time it took me to ask if they wanted me to come back was 15 seconds, and people said yes about 2 out of 5 times.

Just think, I could do something like distribute flyers (about 1 hour) to get 2% to say yes, or I could focus on something that took 15 seconds, where 40% say yes. Needless to say, when I realized this I soon informed the three guys working with me, and tripled its effectiveness instantly.

My key takeaway from this was that much of business improvement is really systems improvement. Though I thought I played a large role in the system, I realized doing the work myself would only take me so far. The productivity of those

around me was just as important. In a system of interconnected parts, our productivity affects others, and vice versa.

Also, I learned that to be productive, I needed to shift from working in the system, to working on it, making it better for those that work within it, as well as for those that benefit from what it creates.

Later in my life, I learned that one of the best ways to apply systems thinking to business improvement is to adopt a *Lean Management* approach. The term ‘*Lean*’ comes from its first use in Toyota’s Production System, established by Taiichi Ohno in the 1940s.<sup>153</sup> According to one study on the subject, “*The Toyota Production System was based around the desire to produce in a continuous flow which did not rely on long production runs to be efficient; it was based around the recognition that only a small fraction of the total time and effort to process a product added value to the end customer.*”<sup>154</sup>

A typical *Lean* approach works as follows:

1. Identify the organizational problem you’re trying to solve.
2. Collaborate with everyone involved in a work process to map it out with all of the steps, inputs, outputs, roles, and

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<sup>153</sup> Melton, Trish. *The benefits of lean manufacturing: what lean thinking has to offer the process industries*. Chemical engineering research and design. Volume 83. Issue 6. 2005. pp. 662-673. <http://www.mimesolutions.com/PDFs/WEB%20Trish%20Melton%20Lean%20Manufacturing%20July%202005.pdf>.

<sup>154</sup> Ibid.

times/costs associated with each task. Gather all necessary data.

3. Collectively brainstorm and decide on ways to improve the process. For example, to eliminate tasks that your customer doesn't care about, to solve the problems you currently face internally, or to include new steps or approaches that can add more value for your clients than they cost to implement.

4. Collectively create a future-state map based on your decided-upon improvements.

5. Test the approach to see if it resolved your issues. If it didn't, change your approach and test again. If it did, implement the new process.

The end result of the approach, if successful, is a reduction in effort and headaches for staff, a reduction in unnecessary costs for the organization, and added value for your clients.

I've seen this approach work multiple times, in ways that can save millions of dollars per year. And I'm not the only one. In one study conducted at the Flinders Medical Centre in Australia, it was observed that process mapping and *Lean thinking*, as described above, resulted in a "significant impact on waiting times and total durations of stay in the Emergency

Department.”<sup>155</sup> Through the implementation of the approach, they could alter their patient triage system to speed patients more quickly through the system, and decrease bottlenecks that led to overcrowding.<sup>156</sup>

According to the study, “...A key element in *Lean thinking* is the practice of starting, not with a potential solution, but with the development of a detailed understanding of how a complex process ... is actually undertaken....”<sup>157</sup>

The researchers also note that *Lean* culture and tools have been successfully implemented in healthcare<sup>158</sup>, service industries<sup>159</sup>, information technology<sup>160</sup>, the office environment<sup>161</sup>, construction<sup>162</sup>, and non-profit

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<sup>155</sup> King, Diane L; Ben-Tovim, David I; Bassham, Jane. *Redesigning emergency department patient flows: application of lean thinking to health care*. Emergency Medicine Australasia. Volume 18. Issue 4. 2006. pp. 391-397.  
<https://static1.squarespace.com/static/567c4e41a976af5d46074719/t/58c9c907e6f2e13463ad00d1/1489619208105/VF+streaming+article.pdf>.

<sup>156</sup> Ibid.

<sup>157</sup> Ibid.

<sup>158</sup> Graban, M. *Lean hospitals: Improving quality, patient safety, and employee satisfaction*. 2008. Productivity Press.

<sup>159</sup> Tracy, DL; Knight, JE. *Lean operations management: Identifying and bridging the gap between theory and practice*. Journal of American Academy of Business. Volume 12. Issue 2. 2008. pp. 104–112.

<sup>160</sup> Middleton, P. *Lean software development: Two case studies*. Software Quality Journal. Volume 9. Issue 4. 2001. pp. 627–639. <https://link.springer.com/article/10.1023%2FA%3A1013754402981?LI=true>.

<sup>161</sup> Tischler, L. *Bringing lean to the office*. Quality Progress. Volume 39. Issue 7. 2006. pp. 34-42. <http://www.ezsigmagroup.com/wp-content/uploads/2017/02/Bringing-Lean-to-the-Office.pdf>.

<sup>162</sup> Nahmens, I. *Mass customisation strategies and their relationship to lean production in the homebuilding industry*. Thesis (PhD). University of Central Florida. 2007. [http://etd.fcla.edu/CF/CFE0001778/Nahmens\\_Isabelina\\_C\\_200708\\_PhD.pdf](http://etd.fcla.edu/CF/CFE0001778/Nahmens_Isabelina_C_200708_PhD.pdf).

organizations.<sup>163</sup>

## Identifying Process Waste

To better understand *Lean* thinking, it's useful to understand the seven deadly wastes that can creep into our work processes. All of these 'wastes' represent potential areas to be improved, to make our work systems more productive:

- **Over-production:** creating a product without a specific customer or client.
- **Waiting:** having product that is sitting idle, not being transformed or purchased/used.
- **Transport:** having product that is needlessly moving around, not being transformed or purchased/used.
- **Inventory:** storing raw materials or product without it being transformed or purchased/used.
- **Over-processing:** performing a step in your process that adds no value for your client.
- **Motion:** having people or data needlessly moving around, without transforming the product.

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<sup>163</sup> Sampson, M. Nonprofit, payload process improvement through lean management. Thesis (PhD). University of Colorado at Boulder. 2004.  
<http://adsabs.harvard.edu/abs/2004PhDT.....258S>.

- **Defects:** errors in the process that require re-work.<sup>164</sup>

Given the above list, can you think of a process in your organization that has one or more of these wastes? What about what *you* create? Consider the following probing questions when looking for waste in your personal workflow, or in the workflow of your team:

### 1: Over-production

- Are you creating more reports, code, products, or documents than your clients actually need or use?
- Do the things you create have more elements than your clients need or use?
- Can you stop doing these extra elements or items?
- Is there an efficient way to only create something when you know you have a specific customer that will consume, use, or enjoy it?

### 2: Waiting

- Do you have reports, code, products, or documents you've created that are waiting on someone else, or some other

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<sup>164</sup> Womack, J; Jones, D. *Lean Thinking*. 2003. Simon & Schuster.

process before being immediately used for their end purpose?

- Can you reduce or eliminate this waiting?

### **3: Transport**

- Are the things you create being physically or digitally moved around needlessly, without any value being added to them?
- Can you reduce or eliminate this movement?

### **4: Inventory**

- Are the things you create, or the things you use to create, being stored somewhere without being immediately transformed or used?
- Can you reduce or eliminate the amount of storage of these things?

### **5: Over-processing**

- Are you doing something as part of your work that adds no value or has no benefit for your client?
- Can you stop doing these things, or reduce the time you have to spend on them?

## 6: Motion

- Are people helping you in your workflow, or are you moving needlessly around to produce what you create?
- Is there data or information that you use in your workflow that is needlessly moving around in your work process, not being transformed or used?
- Can you reduce or eliminate this current movement?

## 7: Defects

- Are your clients or customers informing you of errors in your work that require you to re-do certain elements?
- Can you re-design how you work so that it becomes impossible for these types of errors to occur again? If not, can you put in place steps that ensure you minimize these types of errors before your client receives your final product?

**Lean Thinking:** for 30 *Productivity Points*, schedule in thirty minutes to consider a current process you use at work. If you haven't already done so, identify each step at a high level on a piece of paper and plan to hold a meeting to discuss the process with those involved.



During the meeting, for each step, collectively ask:

1. Does this step contain waste?
2. Does this step add value for our clients?
3. How could we do this step more efficiently?

While this can all be done in a short period of time, for best results, consider this a ‘process optimization’ project and assign a lead.

This challenge helps us improve our work systems to build productivity and efficiency into the process itself. We can reduce wasted time and cost in our work processes by examining how we can maximize value for our clients at each step in the process. This means looking at each step and asking why it exists, whether or not it adds value, and whether or not it contains waste.

*Lean* thinking is not about cost-cutting. It’s about respect for those in the system, and those that benefit from the outputs of the system.

### **When Better is Not Enough**

Sometimes making your workflows and processes better is just not enough. If your products or services are not even coming close to those of your competition, if you’re feeling completely unfulfilled in your work, or if you’re being completely ignored by

your clients or customers, you may need a complete process overhaul.

According to Michael Hammer, the man who coined the term *Business Process Reengineering* (BPR) and set off a rethinking of how we change organizations, “...*Many of our job designs, work flows, control mechanisms, and organizational structures came of age in a different competitive environment and before the advent of the computer. They are geared toward efficiency and control. Yet the watchwords ... are innovation and speed, service and quality.*”<sup>165</sup>

When Hammer wrote these words over 25 years ago, he was lamenting the fact that many organizations were using technology to automate or speed up existing antiquated processes. The challenge is that we continue to make the same mistakes today.

For years, many taxi companies built Websites as a form of brochure but kept their business models the same. It was a small San-Francisco company named Uber that decided to change the way people transportation worked with just a simple phone app in everyone’s pocket.

What was the result of thinking different? In one Australian study, Uber didn’t just become 5% faster than a typical taxi company at picking up clients, they became *nearly twice as*

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<sup>165</sup> Hammer, Michael. *Reengineering work: don't automate, obliterate*. Harvard business review. Volume 68. Issue 4. 1990. pp. 104-112.  
<http://www.markd.nl/content/references/1990Hammer.pdf>.

*fast.*<sup>166</sup>

Not only this, but they also managed to be *20% cheaper*.<sup>167</sup> With Uber, even the risk of getting a rude or unsafe driver is mitigated by the fact that both drivers and passengers have profiles that can be rated and checked before pick-up.

How many of us knew before Uber how other passengers had rated the safe driving of our driver? This begs the unsettling question for the incumbents: why would you want a taxi anymore?

Where does your business stand? Is it like the traditional taxi company, or is it the next Uber? Are you building your model based on what others have done, or on what works best today?

To increase the likelihood your business falls into the latter category, consider the following questions:

- If my business never existed and I had to start over today, with current technology and what I know now, how would it run?
- How would I *like* it to run?
- How would my customers like it to run?
- How would the customers *want* like it to run?

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<sup>166</sup> Lambert, Olivia. *A New Report Explores the Benefits of Uber*. February 1, 2016. <http://www.news.com.au/finance/business/travel/a-new-report-explores-the-benefits-of-uber/news-story/5e41687c9bc2614f07015f85eb784f7f>.

<sup>167</sup> Ibid.

Consider your responses, then ask variations of the questions, “Why?” and “What if?” to question existing assumptions and to imagine possible scenarios when assumptions are changed. For example:

- Why do we still ...?
- Why do our clients still ...?
- Why do our suppliers still ...?
- What if we ...?
- What if our suppliers ...?
- What if our clients ...?

With all these paradigm-breaking questions, does BPR work? In one meta-study on the topic at California State University, it was shown how companies from American Express, Cisco, FedEx, Ford, and Frito Lay, to Pfizer, HP, and Walmart effectively used BPR combined with IT improvements to save millions each year. As examples, American Express used it for their credit authorization process to save \$7M per year, as well as to reduce authorization times by 25% and improper credit denials by 30%. Cisco used it in their sales process to improve productivity by 20%. HP used it in their sales process to reduce time spent in meetings by 46%. Pfizer used it to reduce the time to receive drug approval *in half*. And the list of achievements

goes on.<sup>168</sup>

**Re-engineer Your Process:** for 30 *Productivity Points*, take thirty minutes to consider a current process at work. Plan to hold a meeting to discuss the process with those involved. During the meeting, for each step, collectively ask the previous BPR questions.

Since you'll want to be thinking 'outside the box', ideally pick a unique meeting location with plenty of light, beverages, and energy-packed snacks or food. To maximize your creativity and innovation, consider scheduling the meeting early in the week, and preferably in the morning.

If you're already committed to a process improvement exercise for the same business process, you may want to hold on BPR for now. If you find, though, the existing process is antiquated or broken, you may wish to switch over from a *Lean* analysis to the BPR approach.

This challenge helps us to think differently about processes we may have taken for granted for far too long. We can reduce wasted time and cost in our work processes by 2x, 5x, 10x, or even more, if we're willing to honestly question fundamental assumptions about what we do, why we do it, and how our system works at each step to benefit our clients.

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<sup>168</sup> Attaran, Mohsen. *Exploring the relationship between information technology and business process reengineering*. Information and Management. Volume 41. Issue 5. 2004. pp. 585-596. <https://www.researchgate.net/publication/222407738>.

## Process, Business, and Life Automation

The ‘Dot Com’ era of the late 1990s was an exciting time to be alive. It seemed that the Internet would bring about an entirely new economy overnight. In 1999 alone, there were 457 IPOs, of which the majority were IT-focused. Of those 457 IPOs, 117 doubled in price on their first day of trading.<sup>169</sup> This list included the likes of Pets.com, Etoys.com, Webvan.com, and many more. While a few companies at the time may have been truly end-to-end Web-based businesses, others were just a Web-based façade with old processes on the back-end. As the ‘Dot Com’ bubble burst, one technologist observed: *“Many companies have focused their transitions on developing web-based interfaces to their legacy applications. However, the backend infrastructure is often inadequate to support the offering, not only for established corporations but also, surprisingly, for many newly formed dotcoms.”*<sup>170</sup>

Consider:

- Does the story of the fabled dot-coms that came and went resemble your business today?

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<sup>169</sup> Beattie, Andrew. *Market Crashes: The Dotcom Crash*. Investopedia. Accessed March 2, 2017. <http://www.investopedia.com/features/crashes/crashes8.asp>.

<sup>170</sup> Casati, Fabio; Shan, Ming-Chien. *Process automation as the foundation for e-business*. Proceedings of the 26th International Conference on Very Large Databases, Cairo, Egypt, 2000. pp. 688-691. 2000. <http://ai2-s2-pdfs.s3.amazonaws.com/6f74/369c3bc2772e5bd7080088129182f1daa4f6.pdf>.

- Does your business contain repetitive or antiquated processes on the front or back end?
- How much of your business and work is truly automated?

Similarly, consider your career. In a typical week, you likely perform a number of different activities, both simple and complex. Which of the simpler repetitive activities could you automate to improve your productivity?

A simple example from my own career was providing advice on specific topics related to our project management information systems (PMIS). Often, my colleagues would come to me seeking advice on how our PMIS functioned, as well as key features, how to setup new projects, etc. After a few one-on-one meetings with colleagues delivering similar messages, I realized that if I automated this step by creating online videos, I could share them on the public network and completely ‘automate’ my advisory role in this specific area. This freed more of my time to focus on more complex activities such as project planning and strategizing on process improvement initiatives.

Consider the more complex activities you perform. Could one or more of these be automated? It’s remarkable how more advanced-level activities such as financial investment management and media monitoring are increasingly being delivered via algorithms that require no breaks and can operate for fractions of what humans require per operation.

It’s useful here to do a quick back-of-the-napkin sketch of your high-level end-to-end service or product delivery model for

the main product or service you deliver to your clients. Examine this model and see where processes are more manual than they need to be. This may include areas with repetitive, data-intensive, or rule-based tasks. For areas which look ripe for automation, make a note in your calendar to map out the sub-processes in more detail, outlining the current inputs, outputs, and activities performed.

Using this information, examine how each activity could be automated using information technology. Activities such as managing mailing lists, setting up project documentation, social media monitoring, accounting, reconciliation, and invoicing now have compelling online tools that can automate many of the manual tasks within these functions.

Also, consider your personal life. How much manual work are you performing that could be automated to free up your time for more productive pursuits? Here are a few areas you may want to consider:

1. Set up automatic online bill payments.
2. Set up automatic e-mail alerts if you exceed your monthly budget or exceed your credit limit.
3. Automate the transcription of your notes to your computer for to-do's, ideas, study notes, etc.
4. Automate the task of finding items in the grocery store and placing them in your cart by shopping online and doing local



pick-up, or better yet, choosing home delivery.

Finally, think about the enormous amount of time you spend just earning a living. Is your income completely tied to the number of hours you put in, or are you creating ways to automate your income generation? Consider, if you give advice to others for a living, can you codify some of this knowledge into a downloadable document or video and make it available for consumption online?

This applies not only to teachers and trainers but also to consultants, software engineers, tradespeople, artists, and nearly every skilled profession.

I know of a lady who, instead of providing in-person painting lessons, created a whole series of online videos on all aspects of painting techniques from simple color mixing to advanced composition and brush stroke techniques.

In turn, I've seen a man who took his knowledge of backyard shed building and turned it into a thriving training business.

Don't just limit your automation of advice to what you do in your 'day job.' We give out advice all the time, and with current Web technology it's never been easier to codify that recipe, tip, or technique and send it out into the world.

**Make it Automatic.** for 30 *Productivity Points*, schedule in 30 minutes to consider a current process you follow at work or at home. Consider your role or position. In a typical week, you likely perform several different activities, both simple and complex. Answer these two questions:

1. Which of the simpler repetitive activities could you automate to improve your productivity? This may include tasks where low levels of skill or training are required to perform them.
2. Consider the more complex activities you perform. Could one or more of these be automated? This may include areas with highly manual, repetitive, data-intensive, or rule-based tasks.

This challenge helps us to practice the art of automation. So much of what we do is manual and repetitive, but there are numerous ways we can automate these tasks today with low-cost outsourced help and with widely-accessible Web-based services. Automation is an excellent way to boost our productivity, reduce the time to create what we'd like, and to make more time for rich and diverse experiences.

# 15

## Measuring Progress

*“It doesn't matter which side of the fence you get off on sometimes. What matters most is getting off. You cannot make progress without making decisions.”*

- Jim Rohn, American author and entrepreneur

### Did I achieve my goals?

I have a hunch that the biggest problem we face in achieving the vision for our lives is not that we have weak goals or that we can't dream big. I'm confident that we can dream some amazing dreams. Rather, I believe our challenge is that, as individuals with finite time and resources, we have *too many goals* and so we get overwhelmed or lose focus, and we have *no*

*system we enjoy using to measure progress.*

To counter this, I believe we need to get into the habit of only setting goals that (a) we're passionate about, and (b) we'll be committed to tracking daily.

Goals take ongoing work to achieve, but if it's a goal that matters to you, then the daily work of *acting, tracking, reflecting, acting again, and eventually completing and tracking your completion* is the best thing you could be doing with your time. And so, if you'd like a quick way to remember the commitment that comes with setting a goal, remember, *every day* you should A. T. R. A. C. T. In other words:

- **Act.**
- **Track**
- **Reflect**
- **Act (again)**
- **Complete** (your daily goal), and
- **Track (again)**

A good way to think of this is that the above activities will *attract* what you want in life. Cheesy, right? But it's memorable!

Consider a goal to lose weight. I can set this goal in my mind, and write it down, but it isn't going to be realized until I answer the following:

1. What **actions** am I going to do each day to bring myself closer to my goal?

2. How will I **track** my progress, in a way that's quick and easy,

and maybe even enjoyable?

3. How and when will I **reflect** on my progress to determine if I'm moving forward quick enough, or if I need to change my approach?

4. **Act again:** *How much* acting do I plan to do on a daily basis to get closer to my goal? What is my daily goal or target?

5. How will I know I've **completed** my goal?

6. **Track again:** How often will I track my progress? With every action? Daily? Weekly? Monthly?

When you consider all you'll be committing yourself to doing when you set a goal, i.e. changing your habits and potentially your lifestyle, you realize you need to be truly engaged in the work.

In other words, your goals need to first speak to you on a deep, emotional level. Saying to yourself, 'ya, it would be nice to ...' is not enough to sustain your commitment through the daily grind of implementation and tracking. As such, consider how we could improve the goal of 'lose weight' using the ATTRACT approach:

<b>Goal:</b>	Lose weight by the summer (July).
What <b>actions</b> am I going to do each day?	Take a short jog in the evenings.
How will I <b>track</b> my progress?	I'll mark a happy face on a calendar on my fridge for every successful day, from now until July 1. I'll also measure my weight.
How and when will I <b>reflect</b> ?	At the end of each day, before I sleep.
<b>Act again:</b> <i>How much</i> acting?	Jog 15 mins. each day, 7:00 – 7:15pm
When will I have <b>completed</b> my goal?	Once I've lost 15 pounds from my current weight of ### lbs.
<b>Track again:</b> How often will I track?	Successful jogs tracked daily. Weight tracked weekly.

With these questions answered, it's now clear what we need to do. The next step is to focus our daily reflection on the reminder of *why* we're doing what we're doing. This will help us to maintain our motivation over the long weeks and months that follow, particularly on days we don't feel like jogging. To do this, keep it simple. List your top three reasons for why you want to achieve your goal, and place them *wherever you do your tracking or your reflection*, so that you see them each day.

This might mean taking out a post-it, or a magnetic chalkboard, writing the three reasons, and placing them on your mirror in your bedroom, or if you're not self-conscious, beside your calendar on the fridge. In this way, you'll always be reminded of your story. For example:

*I'm getting in shape to:*

- ✓ *Keep up with the crazy energy of my kids at the park.*
- ✓ *Know I'll be around to be old and gray with my wife.*
- ✓ *Run a marathon when I'm 40, 50, and 60 years old.*

## **A Word on Tracking**

How you track your progress is up to you, as long as you know you'll do it. That said, I've observed a few patterns, or general rules of thumb, that you may find useful:

### **1: Keep it simple**

Track in a way that allows you to quickly write down a dash, a check, an X, or a number. Anything more may seem tedious.

I've been involved in more than one tracking initiative and I can tell you, many of us don't like to track. It's tedious. It feels like something that *takes away time* from actual work. In our personal lives, after a long day at the office, it's worse. Personal tracking can feel like more work when we should be relaxing and having fun with friends and family. I imagine some of us conjure up images of a taskmaster, perhaps from a past employment, ordering us to mark our timesheets! Now, if you can make it effortless, such as a small check on your calendar, you're that much closer to tracking consistently.

## 2: Make it fun

Do you remember those multi-colored sticker walls from Kindergarten? You know, the ones where for every good deed you performed or for every book you read, you got a shiny sticker beside your name? These teachers knew what they were doing. Didn't you want that sticker, if only because *it was a cool sticker*? How's that for intrinsic motivation?

Consider some playful ways you can make tracking personal goals something you look forward to:

1. Go out to a dollar store, and pick up some fun stickers. Buy an inexpensive monthly calendar or print one out and place it on your fridge. Add a sticker to the calendar for every day that you successfully complete your daily goal. If you want to go for a more sophisticated look, try using small round fridge magnets for each completed day. You can pick these up for pennies a piece at the dollar store, your local business supplies store, or Amazon.

2. If you're a geek, like me, make a funky color-coded spreadsheet and keep it up-to-date on your laptop. Yes, it's geeky but I like it, and you might too. I keep the file open in a separate window, at all times, so it doesn't get lost in the digital clutter.

3. As for work goals, draw a thirty-day calendar on your boardroom whiteboard, and add magnets for each day the team



completes their daily target or goal. If you can't sacrifice a portion of your whiteboard, use a marker and draw a calendar on your flipchart. Paste the paper prominently on a wall where the team can see it, and mark off each day as daily targets are completed. If your team is playful, buy some fun stickers and use those instead.

### **Gamify Your Goals**

Why is it that we can get absorbed in a game of *Candy Crush Saga* or Sudoku on our smartphones, but we can't get just as excited about working on life goals that could radically make our lives better?

Unlike typical long-term life and work goals, games are attractive as they promise and deliver *instant wins*. Even longer-term games like *Risk* still have short-term wins sprinkled throughout the game, like when we take over a territory, or turn over a desirable card.

The same goes for similarly 'long games' like puzzles, which give us a little win every time one of those 1,000 pesky little pieces actually fits with another. That's 1,000 little hits of dopamine in a game many of us find a bit dull. So, imagine how bored your brain can get when you don't get any kind of short-term win in your march toward your own life goals.

It's no wonder when we have a choice between playing on our phones or computers, or making progress on our personal goals, that we choose the former after a hard day's work. Often, it's just more satisfying. But, we can learn from the tricks and

strategies of game makers to make our goal achievement more engaging. The concept is referred to as gamification and it's all about applying game-design elements and game principles to non-game contexts.<sup>171</sup>

In an in-depth study of over 800 peer-reviewed articles on the subject of gamification by Jonna Koivisto, of the University of Tampere, and her colleagues, ten key game element components have been commonly observed in gamification implementations.<sup>172</sup>

These include:

- Points
- Leaderboards
- Achievements or Badges
- Levels
- Story or Theme
- Clear goals
- Feedback
- Rewards
- Progress, and

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<sup>171</sup> Huotari, K; Hamari, J. *Defining Gamification – A Service Marketing Perspective*. Proceedings of the 16th International Academic MindTrek Conference 2012, Tampere, Finland, October 3–5. pp. 17-22. [https://www.researchgate.net/profile/Juho\\_Hamari/publication/259841647](https://www.researchgate.net/profile/Juho_Hamari/publication/259841647).

<sup>172</sup> Hamari, Juho; Koivisto, Jonna; Sarsa, Harri. *Does gamification work?--a literature review of empirical studies on gamification*. 2014 47th Hawaii International Conference on System Science. pp. 3025-3034. <http://ieeexplore.ieee.org/stamp/stamp.jsp?reload=true&arnumber=6758978>.

- Challenge

Let's take a look at each element, and how you can apply them.

## 1: Points

Points are perhaps the most common game element. Their ubiquity in games is easy to understand. They typically provide short-term or instant wins. For example: *You do this, you immediately get X points. You do that, you immediately get Y points.*

To use a previous example, let's say your goal is to lose 15 lbs. in six months. Your daily goal is to take a quick jog around the neighborhood each evening around 7:00 p.m.

To keep motivated out on the neighborhood forest paths, you could say to yourself that you'll earn 10 points for every minute you jog. So, if you jog 15 minutes tomorrow, you'll earn 150 points. If you push yourself and jog 25 minutes, you'll earn 250 points! Simple, and effective.

This kind of instant feedback is motivating, but it shouldn't be the only game element you employ as eventually you'll tire of accumulating points unless there's, well, a point.

## 2: Leaderboards

If you've ever played a classic coin-operated pinball machine or arcade game, you know the power of leaderboards to motivate

us to keep dropping quarters to beat the top score. Leaderboards play to our sense of competition and status, to our desire to ‘be the best’ or at least ‘among the best.’

While status might seem like a negative thing to aspire towards, I’m not referring here to the status that one might feel they earn from owning expensive clothing or driving a fancy car, but rather the pride of being excellent at a worthy or noble goal.

For example, let’s say your office is holding an organization-wide charity fundraiser for cancer research. Teams or individuals are asked to request sponsorships (or donations) from their fellow colleagues, friends, and family for an upcoming running event.

A common way this can be gamified is to display a publicly-visible leaderboard throughout the campaign, showing which teams and individuals have raised the most money to date. In doing so, those who have a competitive spirit, or just want to be the best, will work hard to ensure they ‘beat’ the others and raise more money. The more competitive the players, the better the outcome. It’s a great example of *friendly* competition and it’s a powerful motivator for some.

Another benefit of the leaderboard is that the names (or nicknames) of those that are succeeding are publicly displayed to other players, appealing to our desire for public recognition and praise.

Leaderboards can still play an important role, even if you’re just setting goals for yourself. If you’re part of a community of like-minded individuals with similar goals, you could collaborate to share your score with members of the group,

receiving comradery, friendly competition, and social support.

Gabrielle Turner-McGrievy of the University of South Carolina, and her colleague, observed that, in a study of 96 obese adults that did, and did not use Twitter to share their weight loss progress, those that did had a significantly greater amount of weight loss. The effect was so strong that “*every ten posts to Twitter corresponded with approximately -0.5% weight loss.*”<sup>173</sup>

### **3: Achievements / Badges**

Were you ever a boy scout or girl guide? A beaver or brownie? My father was a ‘beaver leader’ so I became actively involved in the program at a young age, earning my badges in knot-making, swimming, computers, fire making, and a number of other beaver skills.

The badges, which I wore on my uniform with pride at every meet, were a visual reminder of the effort I had put into learning something I thought was challenging. A key aspect of badges or achievements, in comparison with levels, is that they’re often a way to display your unique abilities. While everyone may eventually move from Level One to Level Two and so on, only some members would receive certain badges based on their skills and interests. In a way, they’re a tool to display your

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<sup>173</sup> Turner-McGrievy, Gabrielle M; Tate, Deborah F. *Weight loss social support in 140 characters or less: use of an online social network in a remotely delivered weight loss intervention*. Translational behavioral medicine. Volume 3. Issue 3. 2013. pp. 287-294. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3771014/>.

individuality.

Video game developers know this well. In many online role playing games you can of course always play the ‘traditional way’ by beating up baddies and progressing to higher levels, but you can also take a number of non-combative roles to earn achievements or badges. In one popular RPG, this might include fishing, cooking, dog and horse breeding, fish trading, gardening, beer making, and almost anything you could imagine would have been done as a life skill in mediaeval times.<sup>174</sup>

In the example goal to lose 15 lbs. in six months, you could set for yourself a series of achievements (or ‘mini milestones’). For example:

Achievement	How to achieve or “unlock”	How to display achievement (example)
Marathon Man / Marathon Woman	For the first time you jog more than 1 hour in a session.	Draw a little runner on your calendar on your fridge, on the day you earn this achievement.
Overachiever	For the first time you jog more than one session of 15 minutes or more in a single day (e.g. morning, evening)	Draw a little ‘A+’ on your calendar on your fridge, on the day you earn the achievement.
World’s Best Spouse	For the first time you pick up a treat at the store or coffee shop for your spouse during your jog session.	Draw a little heart on your calendar on your fridge, on the day you earn the achievement.

These are just three examples, but you could come up with as many as you like. The more the better, as you’ll have more

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<sup>174</sup> Wikipedia. *Black Desert Online*. Accessed June 4, 2017. [https://en.wikipedia.org/wiki/Black\\_Desert\\_Online](https://en.wikipedia.org/wiki/Black_Desert_Online).

chances to ‘win’ on your journey toward the end game.

In the work example to raise funds for cancer research through a company fun-run, you could consider:

Achievement	How to achieve or “unlock”	How to display achievement (example)
Rainmaker	For the first \$1,000 a team or individual raises, as reported to the campaign organizer.	A flat-panel video screen in the main hallway of the organization (visible to all staff who enter/exit) scrolls through each achievement category, listing the growing recipients of each category throughout the campaign.
Overachiever	For the first \$2000 a team or individual raises, as reported to the campaign organizer.	Same as above.
Public Speaker	For the first 25 individual donations for an individual or team, as reported to the campaign organizer.	Same as above.

A key point is to make the achievements something many players can realistically aspire to receive throughout the campaign, assuming they work hard and stay committed. For greatest impact, achievements should be visible to others aiming to achieve the same target.

#### 4: Levels

Levels are similar to achievements in that they require the participant to achieve a certain level of progress. Unlike achievements however, all participants who achieve the end goal will ‘level up’ through each of the possible levels in the game.

When leveling up with others, such as through an online game, this can be highly motivating. Immediately you've found a kindred spirit who has been through the grueling ordeals to date and can empathize and provide you with social support as you continue leveling up toward your goals.

In the example goal to lose 15 lbs. in six months, to use levels you first need to set an appropriate 'end goal' for the game. In this case, you could set it as having achieved a weight of 180 lbs., assuming you currently weigh 195 lbs.

From here, just break out your levels into logical increments from where you are, to where you want to be.

In this case:

- Level 0: 195 lbs. (current situation)
- Level 1: 194 lbs.
- Etc.

How you split your levels is up to you. To avoid 'level overwhelm', however, you probably want to limit your levels to no more than 100. Also, you want levels to represent significant milestones, not something you necessarily achieve every day you run.

In the work example to raise funds for cancer research through a fun-run, you could consider the ideal 'end game' being that everyone raises at least \$500, and so:



- Level 0: Raised \$0 to \$49
- Level 1: Raised \$50 to \$99
- Etc.

Again, there's no rule for how you set your levels. The key aspect is that they should support the primary goal of your game.

## **5: Story / Theme**

All good games engage you with a compelling story or theme. For the purposes of your goal, is it truly compelling? This is important as you may assume you could gamify anything and make it interesting, but if you're just gamifying the goal of 'making more sales', 'losing weight', or 'raising money for charity', that's not very interesting. For the game (or goal we want to achieve) to be interesting, we have to dig deeper and ask *why* do we want these things? How does meeting this goal support my values? What do I get from achieving it? What do others around me get from me achieving it?

As we saw earlier, for the personal goal to lose 15 lbs. in six months, this means having more energy to play with my kids, being healthy enough to enjoy many golden years with my wife, and being able to run a marathon at various stages of my life. The journey toward achieving these compelling goals is my story that I place on the fridge to motivate me to keep playing the game.

In the example to raise funds for cancer research through a

company fun-run, since there are multiple players in the game, you want goals that speak to the values of most players, but also ones that are player-specific, if possible. To do this, when promoting the campaign, you could communicate the stories of real individuals in the community that have benefitted from the research funds, such as those that have overcome cancer and are enjoying their lives to the fullest.

In addition to promoting goals that speak to many, encourage players to think of their own reasons. Encourage teams and individuals to pick someone they know who is suffering from cancer or has suffered in the past to be their slogan. For example, “We’re doing it for Sarah.” We all crave meaning and narrative to our actions, so wherever possible, give yourself and the other players a powerful story.

## **6: Clear goals**

Life may be complex and at times ambiguous, but games always have a goal. This is what makes them so fun to play. Sure, you might be playing a game in the mystery genre with plenty of unknowns, but you still know your goal is to ‘solve the mystery.’ And even if the aim is to simply ‘earn as many points as possible’, this is also clear.

For our purposes, however, this is where SMART goals come in. Ideally you want your goal to be Specific, Measurable, Achievable, Realistic, and Time-bound.

In the example of losing weight, a goal to “Lose 15 lbs., from 195lbs to 180lbs, in six months” is a great one. In the example

of raising money for cancer research, a suitable organizational goal could be “Collectively raise \$50,000 over the three-month campaign.” Your goals should also be clearly communicated to all players on more than one occasion so that everyone knows exactly how success will be measured.

## 7: Feedback

In the real world, it can be frustrating to see bad things happen to good people and good things happen to bad apples. With games, however, feedback tends to be more immediate. Good actions are rewarded. Bad actions are penalized.

Also, feedback loops in games tend to be much shorter than in real-life. You help someone in a game, you earn 1,000 points *instantly*. You hurt a good character, you lose the game or your game life *instantly*.

We like these kinds of immediate feedback loops as they make the rules of the game clearer. For example: “*I know if I want to ‘win’ the game I need to do A, B, or C. If I do X, Y, or Z, I lose.*”

To apply smart feedback loops to your game, or goal, try to keep them as short-term or immediate as possible. In the example of losing weight, your feedback loop comes from the various mechanisms you combine together, i.e. earning points (short-term), leveling up (medium term), earning achievements (medium to long-term), etc.

You want to ensure the combination of elements you’re using is allowing for regular feedback throughout the game. In the

example of raising funds for charity, your feedback loop also comes from how you structure your points, levels, and achievements.

## **8: Rewards**

While achievements or badges tend to play to our intrinsic motivations, i.e. we like them just for what they are, rewards play to our extrinsic motivations, i.e. we like them for what they give us.

Some fun rewards you could consider for your weight loss:

1. After achieving 150 points, you earn a \$10 gift card to Starbucks, paid for by the campaign.
2. At Level 5, you earn one free dinner for two with your spouse at that little Vietnamese restaurant you love.
3. At Level 10, you earn a day at the Spa, while your kids hang out with your spouse and parents at the museum.

For the charity campaign, you might want to consider:

- At Level 3, you earn a free campaign t-shirt (value: \$8)
- At Level 5, you earn a free gift card to Starbucks (value \$10)
- At Level 7, you earn a free stylish campaign sweater (value \$15)
- At Level 8, you earn a free mall gift card (value: \$20)

The key with extrinsic rewards is that they should be small enough that they don't extinguish your internal motivations. Keep them enjoyable, but simple.

A trip to Europe for losing 5 lbs. might be pushing it, but you be the judge. Similarly, rewarding an employee with a large cash incentive (or expensive gift) to raise funds for charity will start to take away from the purpose of the original exercise. As an alternative to cash-based gifts, consider requesting gifts and gift cards be donated from local businesses.

## 9: Progress

Imagine you run on the treadmill on Tuesday evening, and then jog on Thursday, only to check your weight at the end of the week to see *no change at all*. The problem with measuring long-term goals solely over the short-term is that (a) sometimes slow progress can look like no progress, and (b) over the short-term there can be a natural variation in progress. We're not always perfect, nor entirely consistent. We procrastinate more on some days, and overachieve on others. Life has a way of getting in the way of our best-laid plans. If we solely judge the success of a six-month goal after just a single week of progress, there's a good chance we could easily give up on an off week.

This is why progress in games is so important. In games, you see progress *all the time*. Even if you haven't yet reached the leaderboard, you're leveling up, and before you've leveled up you're earning achievements. For almost every minute you play

the game, you're earning points. Progress, progress, progress.

For both the weight loss example and the charity campaign, progress occurs on a regular basis over the short, medium, and long-term. This is ideal to ensure we, as players, remain engaged and committed to our goals from beginning to end.

## **10: Challenge**

Without challenge, a game can feel repetitive or dull. At the same time, with too much challenge, we struggle to keep up, or we simply give up. The key is to find just the right amount of challenge to stay engaged.

This 'right amount' shouldn't be static though, as we tend to increase our skills throughout a game, making tasks we thought were hard at the beginning feel easier over time. As such, you should ideally scale your challenges to be of *increasing difficulty* over time.

In the example of losing weight over six months, perhaps start the first week's challenge with light jogging ten minutes per day, and then, after a month, ramp up to fifteen minutes of more intense jogging per day. By the end of the second month, you can then ramp up to twenty minutes per day with variable terrain (e.g. trails) as opposed to sidewalks or roads.

If you don't have issues with jogging the same amount every single day, on the same paths, then go for it. Some of us are like that! But, if you find a lack of a challenge is creeping in, then find small ways to ramp up your game as you move towards your goal.

For the example of raising funds for cancer research, players' goals are already fairly challenging, i.e. convince others to sponsor them with their hard-earned money, and so you may not need to ramp up the difficulty over the campaign period. Given raising money is not something that players will do so *much* that they'll get bored of the act (after all, they do have day jobs!) you're probably safe to keep the level of challenge consistent. That said, one way you could increase the level of challenge would be to raise the minimum amounts required to earn each achievement or reward if you found they were too easily or too quickly obtained in previous years. Be careful though, as each year you'll have staff that retire or leave as well as new recruits, making the campaign dynamics unique year over year. When in doubt, try to err on the side of easy playability and accessibility.

### How Did You Do?

Remember those *Productivity Points* that were awarded for each successfully completed productivity challenge? How did you do?

0 – 50 pts	Level 1: Apprentice
51 – 200 pts	Level 2: Executor
201 – 350 pts	Level 3: Master Executor
351 – 510 pts	Level 4: Productivity Guru

I imagine at this point you've completed some of the challenges

and others have been booked for a future date. It's not necessary to complete all of the challenges, but to get the most from this book it may just be the quickest way to a more productive work and life.

In terms of next steps, take a moment to reflect on where you now stand with respect to your personal productivity, given what you've learned, the productivity challenges you've taken so far, and the challenges you plan to take in the coming days.

Once you've identified your next steps, be sure to schedule these into your calendar as one-time or recurring commitments.



# 16

## Putting it All Together

*“Learn from the mistakes of others. You can’t live long enough to make them all yourself.”*

- Eleanor Roosevelt, American politician, diplomat, and activist

### The Right Tool for the Job

The following tools are designed to combine many of the concepts in this book into actionable steps you can take to move forward in your life and work. They’re also a culmination of my own trial and error. These tools include:

- **Tool 1 - The Four-Step Work/Life Planner**  
Use this tool to define, or refine, your life and work vision, goals, priorities, and commitments.

- **Tool 2 – The Goal Gamifier**

Use this tool to apply gamification concepts to your goals to boost your motivation.

- **Tool 3 – Your Personal Task Management System**

Use this tool to define, or refine a personal task management system to store, group, and prioritize all of your actions, ideas, and commitments.

- **Tool 4 – Learn Anything Faster**

Use this tool to apply the concepts of metacognition and active learning to your training activity to increase retention speed and training applicability.

- **Tool 5 – Tell Better Stories with the Method of Loci**

Use this tool to apply the Method of Loci to more quickly commit narratives to memory such as stories, anecdotes, pitches, and presentations.

- **Tool 6 – The Energy Boost Check-In**

Use this tool to boost your energy and focus as you tackle your goals throughout the day.

- **Tool 7 – A Better Decision-Making Process**

Use this tool to more quickly make difficult individual and group decisions using the Multi-Attribute (MA) model as well as the Nominal and Delphi framework for group decisions.

- **Tool 8 – The Changemaker**

Use this tool to encourage others to make changes in their lives.

- **Tool 9 – A Better You: A Practical Guide**  
Use this tool to develop and refine your character to improve your effectiveness.
- **Tool 10 – Checklist for Process Improvement using Lean**  
Use this tool to improve the effectiveness of your work processes using the Lean methodology.
- **Tool 11 – Checklist for Work/Life Automation**  
Use this tool to automate various aspects of your work and life to gain more time for more productive endeavors.
- **Tool 12 – Super Simple Daily Check-In (or “sticky”)**  
Use this tool to quickly manage your goals, priorities, and commitments on a daily basis for improved productivity.



## **Tool 1: The Four-Step Work/Life Planner**

Being productive requires that we understand our priorities, or how to discern the number one task we should perform at a given moment. In turn, our priorities are based on our vision of the kind of life we want to create. Given this, a useful process to examine these concepts is as follows:

- Step 1: Create your vision (for life and work)
- Step 2: Breakdown your vision into a series of goals
- Step 3: Prioritize your week (schedule your goal commitments)
- Step 4: Monitor your progress and adjust approach (ongoing)

The following sections walk through each of the four steps.

### **STEP 1: Create your vision**

Your Short Game: *Where do you see yourself in exactly 12 months from now?* Describe a typical day by answering each of the following questions in vivid detail:

1. Where are you living? What's it like?
2. Who's with you?

3. What do you do for income?
4. How's your level of fitness?
5. How are you nurturing your family life and relationships?
6. What's your financial situation? Are you financially independent, or on your way?
7. How are you serving your local community or the larger national or global community?
8. What do you do for fun after work? What are your hobbies?
9. What do you do on weekends?
10. Where do you go on your holidays? What do you do on your holidays?

Your Long Game: *Where do you see yourself in 5 to 10 years from now?* Describe a typical day by answering each of the following questions in vivid detail:

1. Where are you living? What's it like?
2. Who's with you?

3. What do you do for income?
4. How's your level of fitness?
5. How are you nurturing your family life and relationships?
6. What's your financial situation? Are you financially independent, or on your way?
7. How are you serving your local community or the larger national or global community?
8. What do you do for fun after work? What are your hobbies?
9. What do you do on weekends?
10. Where do you go on your holidays? What do you do on your holidays?

## **STEP 2: Define your goals**

Now that you've written down the vision you want, both short and long-term, identify the steps you need to take to go from where you are to where you want to be.

Before creating your actions, however, you need to be clear on what you're achieving. So, let's turn your vision into a series of concrete goals. The following sections will cover six common goal-setting areas of your life. These include:



Career and Current Work



Health and Fitness



Finances and Financial Security



Home and Family



Relationships and Friends



Spirituality/Well-being and Service to Community

For each of the six areas of your life, think of the top three goals you'd like to achieve, and how you'll ensure that you achieve them. To do this, answer the following sections:

**Goal #1:** (I want or need to ...)

Timeframe: (I want or need to do this by...)

Measure: (I'll know I've achieved this when...)

**Goal #2:** (I want or need to ...)

Timeframe: (I want or need to do this by...)

Measure: (I'll know I've achieved this when...)

**Goal #3:** (I want or need to ...)

Timeframe: (I want or need to do this by...)

Measure: (I'll know I've achieved this when...)

Now, answer the following questions:

1. What could go wrong in trying to achieve these goals?

What are the risks?

2. What can I do, now or later, to reduce the chance of these risks happening?

3. What daily habits or “when-then” implementation intentions should I take to support these goals? (e.g.: “When X happens in my week, then I’ll ...”)

### **STEP 3: Prioritize your week**

Now that you’ve written down the vision you want, and you’ve turned this vision into a set of concrete goals, define the weekly commitments that will bring you from where you are to where you want to be.

#### **Your calendar**

Look at your personal calendar and add into it any existing commitments that you do each week (i.e. those you had



committed to perform before this exercise). You can ignore any one-time commitments such as birthdays, dental appointments, etc.

Day	Activity	Start Time	End Time
Sundays			
Mondays			
Tuesdays			
Wednesdays			
Thursdays			
Fridays			
Saturdays			

**Clearing your plate**

Given the goals you’ve now clarified for the next year and for the next 5-10 years, are there any existing commitments you make each week that you’d like to remove from your calendar to free up more time? If so, remove these now.

**Making commitments associated with your goals**

Once you’re left with only commitments you want to continue

to make, *add in at least one time commitment for each goal you've identified*. Some goals will require you to setup more than one timeslot in your routine (e.g. jogging 15 mins. each evening, 7:00 – 7:15pm).

Even if some of your goals only require 10-15 minutes of your time on a weekly basis, be sure to add this time into your weekly routine. It's important that you allocate the time it takes to ensure your goals become a reality.

### **Make it real**

Once all your commitments have been added to the table above, add these commitments into your actual calendar.

For example, add these weekly commitments in as recurring events so that they appear each week going forward. You may also want to set up a text or e-mail notification 15 minutes before the event occurs so that you never forget about an upcoming commitment. This is particularly useful for commitments you haven't done before.

Over time, these commitments will become a habit. Until then, getting notifications is a useful way to get into the swing of things.

### **STEP 4: Monitor and adjust**

After a week has passed with the new schedule, ask yourself: Am I fulfilling all my new commitments? For commitments you couldn't fulfill, consider:



1. Changing the time of a commitment to a time where you'll have less distractions.



2. Reducing the weekly allocation of time for a commitment to more easily accommodate other work.



3. Increasing the weekly allocation of time for a commitment, as the time you allocated wasn't sufficient to accomplish what you need to do.



4. Adjusting the location of where you're working on a commitment to reduce the chance you'll be distracted by things or people.



5. Adjusting the activities you perform before your commitment to ensure you have sufficient energy and focus to do it well. For example, eating a healthy snack, going for a light jog or walk, etc.



6. Adjusting more macro-level factors such as the typical amount of sleep you get, the amount of exercise you get, or the time you commit to diversions such as watching TV, browsing the Web, etc.



7. Re-evaluating the reasons for why you want to achieve a particular goal, asking ‘Does this goal still matter? Do I still want this?’



8. Increasing your personal interest in progressing towards the goal by adding game elements. These might include points for making progress, levels for key progress milestones, achievements for notable actions towards your goal, etc.



## **Tool 2 – The Goal Gamifier**

### **When would you use this tool?**

Sometimes the journey towards achieving our goals is highly motivating in and of itself, such as when learning a new video game, or aiming to watch every episode of our favorite TV series on Netflix. At other times, progress can feel like watching grass grow.

If you've ever had a goal to lose weight, or to write a great novel, or to study for an upcoming exam, you know that not every hour you commit to progressing on your goal is filled with excitement and joy.

If you find you have a worthy goal that involves activities that are not intrinsically motivating, i.e. you don't perform them just because, then consider gamifying your goal progression.

A good sign that your goal may benefit from gamification is that you've previously committed time in your calendar to progress on the goal, however you often get distracted or fail to follow-through on your commitment.

## STEP 1: Build Your Game Components



### Story / Theme

What am I trying to achieve? *Why* does this goal matter to me?

How does this goal support the vision I have for my life?



### Points

What habits or repetitive actions will bring me closer to my goal?

(e.g. do X once a day, or do Y once/twice/three times a week, etc.)

If what you do to progress on your goal differs significantly week to week, then your recurring action should be ‘to work X hours a day (or week) on my goal’. You complete this action if you follow-through and work the full time you allocated each day (or week).

For every action you successfully complete, award yourself ten points. Ten is a nice round number that’s easy to work with.

For example:

- 10 points awarded for every minute you jog.
- 10 points awarded for every page you write.
- 10 points awarded for every blog post you make.
- 10 points for every sale to a customer.
- 10 points for every minute you're on the phone with prospects.
- 10 points for every one-hour session you work on your goal.



### **Leaderboard**

#### **Is your goal only for you to achieve? Yes/No**

*If you answered 'Yes', skip this section.* Although a leaderboard is not necessary if you're progressing solo, a good idea is to connect with a social network that has members achieving a similar goal (e.g. lose weight, become a better runner, etc.) and to periodically compare your progress with others in your peer group. While everyone's progress is unique, the social support and friendly competitive spirit that can be achieved from this approach is useful for motivation.

*If you answered 'No',* every week or month, as individuals progress towards goal achievement, post the results of the top 10 in a public location such as a poster in the eating area, a video screen at the main entrance, or on the homepage of the

company intranet. You want to pick a location that will receive plenty of traffic to ensure those that are performing with excellence are recognized, encouraging others to do the same.



**Achievements / Badges**

As you progress towards your goal, you’ll complete a number of ‘mini milestones’. These milestones will become your achievements.

**Example One – Running to Lose Weight**

Achievement	How to achieve or “unlock”	How to display achievement (example)
Marathon Man / Marathon Woman	For the first time you jog more than 1 hour in a session.	Draw a little runner on your calendar on your fridge, on the day you earn this achievement.

**Example Two – Fun Run to Raise Money at Work for Charity**

Achievement	How to achieve or “unlock”	How to display achievement (example)
Rainmaker	For the first \$1,000 a team or individual raises, as reported to the campaign organizer.	A flat-panel video screen in the main hallway of the organization (visible to all staff who enter/exit) scrolls through each achievement category, listing the growing recipients of each category throughout the campaign.



Given this, complete the following section for each achievement:

1. Achievement name
2. How to achieve / unlock
3. How to display



### **Levels**

Levels are similar to achievements in that they require you to achieve a certain level of progress. Unlike achievements, which may be optional, as you progress on your goal it's expected you'll 'level up' through each of the possible levels in the game. Levels are similar to major milestones. Given this, ask yourself:

### **Can you quantify your goal? Yes or No**

*If you answered 'Yes', take the value you will have once you achieve your goal. For example, if you want to lose 15 lbs. in 6 months, and you now weigh 195 lbs., your end value is 180 lbs. From here, create 5-20 levels between the value you are at now, and the value you want to achieve. In this case:*

- Level 0: 195 lbs. (current situation)
- Level 1: 194 lbs.
- Etc.

*If you answered ‘No’*, take the level of work you estimate will be required to complete your goal, and use this for your scale. For example, let’s assume your goal is to build a backyard shed from blueprints and you know from speaking with others this will require roughly 40 hours of work, if done by yourself. From here, create 5-20 levels between the beginning and the end.

In this case:

- Level 1: 0 hours completed.
- Level 2: 5 hours completed.
- Level 3: 10 hours completed.
- Etc.



## **Rewards**

While achievements or badges tend to play to our intrinsic motivations, rewards play to our extrinsic motivations, i.e. we like them for what they give us. Examples:

- After achieving 150 points, you earn a \$10 gift card to Starbucks, paid for by the campaign.
- At Level 5, you earn one free dinner for two with your spouse at that little Vietnamese restaurant you love.

- At Level 10, you earn a day at the Spa, while your kids hang out with your spouse and parents at the museum.

Given this, enter your fun rewards in the section below for each reward:

1. Reward name
2. How to achieve
3. What you receive

Now that you have all the elements needed for your game, the only next step is to play! It's a good idea to ask yourself at the end of each week, "*Am I still having fun?*" If not, tweak the game elements as you see fit. Perhaps increase (or decrease) the level of challenge for your achievements, make points easier to collect (or more difficult), tweak the story for why this goal matters to you, or adjust the rewards.

This game is yours to play (and win) so make it fun!



## **Tool 3: Your Personal Task Management System**

### **Why have a task management system?**

Given the limitations of short-term memory, to be our most productive we need a task management system that is robust, flexible, and travels with us wherever we go. Follow the steps below to create a task management system you'll love to use:



### **1: Pick your single location to store tasks and ideas**

Choose the single location you prefer from the list below:

- ☐ Large notebook (pen and paper)
- ☐ Small pad of paper kept in your pocket (pen and paper)
- ☐ Electronic document stored on your computer
- ☐ Application on your computer or phone (e.g. Todoist)
- ☐ Electronic document online (e.g. Google Docs)



## 2: Pick your categories and priorities system

Without categories, you'll have one massive, unwieldy list of things to do, shower thoughts, grocery store items, project ideas, etc. Without priorities, you won't know what should be tackled first, and by when.

So, choose the categories and priorities framework you prefer from the list below:

Check all categorization methods that you would like to use:

- ☐ By project (e.g. all tasks for Project X, Project Y, etc.)
- ☐ By date you'll act on it, or complete it
- ☐ By context (e.g. all tasks to do at your home, office, etc.)
- ☐ By life category (e.g. health, career, family, relationships)
- ☐ By personal priority (e.g. stronger relationships, losing weight, etc.)
- ☐ By time of day (e.g. early morning, late afternoon, etc.)
- ☐ By person who will help you (e.g. Jack, Mary, Tom, etc.)
- ☐ By amount of work required (e.g. 10-30 mins, 30-60 mins, or 60+)
- ☐ By amount of attention and energy required (e.g. low,

med, high)

Check all prioritization methods that you would like to use:

- ☐ By urgency (urgent, non-urgent)
- ☐ By importance (high/med/low importance)
- ☐ By stakeholder (my director, my manager, my colleagues, other)
- ☐ By company priority (priority x, priority y, priority z)
- ☐ By personal priority (priority a, priority b, priority c)
- ☐ By deadline (due today, tomorrow, end of week, other)

As a reminder, aim to prioritize work that is either urgent and important, or non-urgent and important. Importance should be based on the intersection of: (a) work that most closely aligns with your organization's vision and where it's going, (b) work that most closely aligns with your skills and career goals, and (c) work that your clients most want or need.



### **3: Setup your system**

A task management system should be flexible and easy to use. You'll be relying on your system for all of your ideas and commitments, so try to keep it as simple as possible. Based on steps 1 and 2, take 30-60 minutes to do a 'brain dump' of everything that's on your mind.

Consider:

- Things I need to do
- Things I need to buy (groceries, gifts)
- Things I need to clean
- Things I need to do around the house
- Things I need to plan for (e.g. vacation)
- Things I want
- Ideas for projects
- Ideas for work
- Ideas for home
- Other (anything else nagging you)



#### **4: Process your tasks and ideas**

Take the list of ‘stuff’ that you’ve written down and add each item to your system under the appropriate (a) category, and (b) priority. Every item should have a category and priority, or it shouldn’t be in your system.

For items that you wish to complete in the coming week, schedule them in now for a specific time and day. A good practice is to setup an e-mail or other electronic reminder.

At the end of each week, schedule the items you’d like to accomplish for the week ahead. Also, re-schedule any items you did not fully complete. For completed items, delete them from your system, or move them to a “Completed items” section for reference.



## **Tool 4: Learn Anything Faster**

### **Why are we spending time on learning?**

Learning a new skill or body of knowledge can be a tedious and time-consuming activity if we're not clear on how we like to learn, why we're learning something, and how we'll use our knowledge once acquired.

In our younger years, we often didn't have to ask these questions as we were required to learn simply to proceed to the next grade or level. Once there are no more levels, however, getting the most from our self-directed learning requires us to better understand where we want this knowledge to take us with our career, business, or life journey. As such, choose your preferred options from the list below:



### **How I like to learn (teaching approach)**

- ☐ I prefer to learn in a traditional classroom setting.
- ☐ I prefer to learn in a scheduled online course, in a group.
- ☐ I prefer to learn in a scheduled online course, by myself.



- ☐ I prefer to learn at my own pace with my material, by myself.



**How I like to learn (media format)**

- ☐ I prefer to learn by watching videos and taking notes.
- ☐ I prefer to learn by reading textbooks and taking notes.
- ☐ I prefer to learn by reading non-fiction books and taking notes.
- ☐ I prefer to learn by using interactive online content.
- ☐ I prefer to learn by listening to podcasts, and taking notes.

Given my preferences, I will seek out, where possible, training and knowledge where I can learn in/at: [insert teaching approach] and learn by [insert media format].



**How I like to learn (advanced study methods)**

Select one or more of the methods you currently enjoy using, or would enjoy using in the future:

- ☐ Coming up with a question that interests me about the content, and working with the course materials and other sources to find a suitable answer. (inquiry-based

learning)

- ☐ Applying a concept from the content to an immediate problem or challenge at work. (practical application)
- ☐ Taking a concept I've just covered, and sharing it in my own words with a colleague, spouse, or friend. (peer instruction)
- ☐ Coming up with a problem or challenge facing my team or organization, or family, as related to the content, and solving it in a group setting. (cooperative problem solving)
- ☐ Seeking out models, diagrams, and figures from reputable sources that illustrate how many of the concepts I'm learning fit together and operate. (modeling)

Given the items I selected above, I will be using the following study preferences going forward: [add study preferences].



### **Why I'm learning and what I'll apply**

The top 3-5 skills (or competencies) I'm trying to learn this year are: [add skills and competencies]

I want to learn these skills as it means for my life, work, or  
career: [add reasons]

I will be applying this knowledge to specifically do the following  
tasks: [add tasks]



## **Tool 5: Tell Better Stories with the Method of Loci**

### **Why use the *Method of Loci* for storytelling?**

By using the *Method of Loci*, you can more quickly commit speeches, pitches, presentations, jokes, and anecdotal stories to memory. The potential applications are nearly limitless, from quickly establishing rapport with your clients, to more naturally delivering presentations that get clients or colleagues to commit to your next big product or idea. For each section below, check the box that applies:



### **My story content**

(what I want to commit to memory):

- ☐ A work presentation or pitch.
- ☐ A speech.
- ☐ A joke (for ice breakers).
- ☐ An anecdote (for ice breakers).
- ☐ Other.



### **My Memory Framework**

(to be used to peg story content to objects):

- ☐ My kitchen.
- ☐ My bedroom.
- ☐ My office.
- ☐ My living room.

Once you have your content and framework, chunk the content you want to commit to memory into sequential bits, and peg each bit of content to a location with a memorable or funny story.

Preferably, move through your content as you move from object to adjacent (or nearby) object in your chosen room. Use only the highlights or key elements of your story for pegging. You can fill in the details as you go along.

Piece of content (from story)	Object in your location (framework)	How I remember the connection...

Once all key pieces of content are included in the table above, practice telling your story, pulling up each piece of content (or location in your scene) from memory. Happy storytelling!



## **Tool 6: The Energy Boost Check-In**

No matter how exciting our goals are, or how much intrinsic motivation we have for our work, if we're tired, hungry, moody, or distracted, our productivity will suffer. As such, managing our energy, throughout the day, is a key component of being productive.

### **How's my energy?**

Examine the information below and ask yourself the appropriate questions based on how you feel. Asking these self-reflective questions should not replace the expertise of a psychologist or medical practitioner. Some answers may not apply as everyone has different energy needs. The key point is that you should aim to feel 'full of energy' throughout your day.

### **How I'm Feeling**



*Forgetful or slow (fluctuating energy)*

Do I feel I'm consuming too much sugar in my diet? If so, consider:

- Cutting the sugar you take in your hot drinks in half.
- Reducing soda consumption.
- Reducing sweetened snack consumption.
- Replacing more hot beverages with herbal, rooibos, or mint-based teas that have more flavor without added sweetener.

### **How I'm Feeling**



*Tired, especially in the evening (decreasing energy)*

Do I feel I'm not getting enough sleep each night? If so, consider:

- Assessing the actual sleep you get on average over a week. Your average should be 7-9 hours. While you may average seven hours per evening, your body may work best with more.



- Reducing screen time with television, laptops, tablets, and phones at least one hour before sleep. This reduces the sleep-suppressing effects of blue light.
- Adding in more short naps during your weekdays or weekend. Even just fifteen minutes can help.

### How I'm Feeling



*Hungry, especially around 10:00 a.m. and 3:00 p.m. (energy drop-offs)*

Do I get hungry throughout the day, despite having three large meals? If so, consider:

- Reducing the size of your breakfast, lunch, or dinner and adding in a mid-morning and mid-afternoon snack.
- Adding in more energy-dense but healthful snacks such as dried peaches, dried apricots, and plain almonds. Keep a handful at your desk for easy consumption.

### How I'm Feeling



*Jittery, irritable, or distractible (erratic energy)*

Do I feel jittery, irritable, or distractible after my coffee or tea?

If so, consider:

- Replacing more of your coffees or teas throughout the day with non-caffeine options such as decaf coffee, herbal teas, juice, or lemon water.
- Taking a lunch-hour walk or jog to regulate your stress levels. Caffeine can increase a number of stress hormones from epinephrine to cortisol, which aerobic exercise can counterbalance.

### How I'm Feeling



*No change, after my morning coffee or tea (caffeine not affecting energy levels)*

Do I feel no change in my energy levels after my morning or

afternoon coffee or tea? If so, consider:

- Going ‘cold turkey’ (abstinence) to reset your baseline. This means no caffeine for 2-3 days. After this period, re-introduce caffeine only for periods where you feel you need additional energy. Going forward, try to minimize consuming more than two caffeinated beverages per day.
- During your abstinence period, try non-caffeine options such as decaf coffee, herbal teas, juice, or lemon water. If you still feel tired, have a snack or get outside for a short walk.

### How I’m Feeling



*Wired right until my head hits the pillow, and then it takes 30 minutes or more to fall asleep (energy not winding down naturally)*

Am I watching my television, computer screen, tablet screen, or smartphone screen right up to the moment I prepare for bed? If so, consider:

- Activating ‘evening mode’ on your electronic device to reduce sleep-suppressing blue light.
- Going device-free one hour before you go to bed to allow your sleep hormones to naturally kick in.
- Replacing device use with books or magazines from the library.

### How I’m Feeling



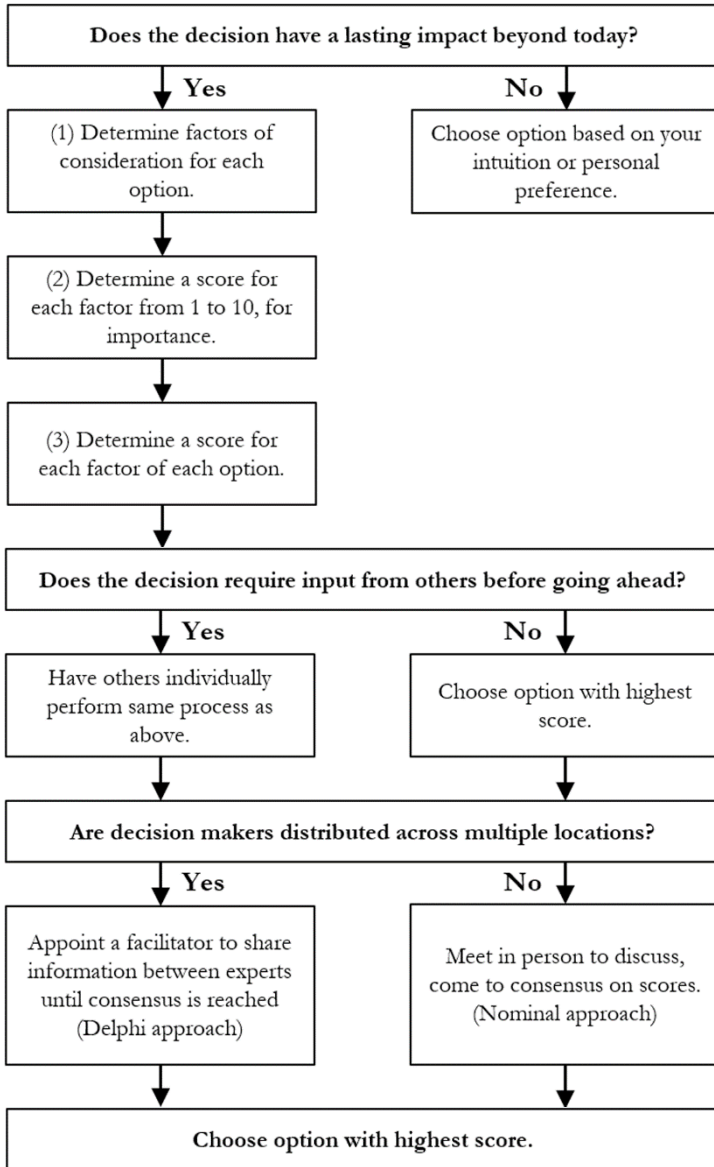
*Mildly fatigued throughout the entire day (consistently low energy)*

Do I feel I’m generally sedentary in my lifestyle? Do I not typically get at least three aerobic exercise sessions per week where I raise my heart rate for about 20 minutes or more? If so, consider:

- Scheduling more exercise sessions in your weekly routine. At first, consider lower-intensity, less structured exercise such as walking, light jogging, and hiking. Later on, consider more structured exercise such as gym time, swimming lanes, and group sports.



## Tool 7 – A Better Decision-Making Process





## **Tool 8: The Changemaker**

### **Encouraging change in others**

The following steps are to support you in encouraging changes in the beliefs and actions of others. These steps are based on the science of influence and, as such, do not guarantee results. That said, they should improve your odds of success.



#### **1: Clarify the change you want in the world.**

If I had a magic wand, I would wish that (stakeholder) would (behavior). This means they would have to believe (belief).



#### **2: Listen to their perspective on the issue. Identify what behaviors and beliefs they currently support.**

Before expressing my desire or opinion, I have discussed the topic related to the change I want to see with them and I have determined that they associate reluctance/avoidance to doing (behavior) because they believe (belief). I have also determined

that they have an affinity/liking to doing (behavior) because they believe (belief).



**3: Propose your change in a way that is consonant with their existing beliefs and behaviors.**

In expressing my desire or opinion, I will present it to them in a way that complements their existing beliefs. I will explain that by not doing the new behavior, they could be conflicting with their belief that they are (held belief). I will also explain that by not doing the new behavior, they could be forced into a situation where they need to do (behavior they try to avoid performing).



**4: Give before asking.**

After expressing my desire or opinion, I will offer to help them with a particular need or challenge they face. This offer will be given freely and will be (free item or service). There will be no expectation or requirement for a returned favor.



### **5: Request their commitment to a small ask.**

If they accept my free offer, I will make a small request (a challenge for them to pursue) related to the larger change that is both low effort and requires little belief or behavioral change. My requested challenge will be (insert challenge). Once this small challenge is completed, I will request a larger related task. This task will be (insert task). Once this larger task is completed, I will request the most cognitively or physically difficult task, which is (insert task).





## **Tool 9: A Better You: A Practical Guide**

As we've seen, we can be more productive by being better people. Whether this means we strive to be more honest, humble, self-sacrificing, positive, or empathetic, all of these factors positively influence our personal productivity. Not only this, but in the process of betterment we also become healthier and less stressed.

Each of us can believe that we are good people, but actions speak louder than words. Character is both a set of beliefs and a set of actions. So, consider the following tangible actions we can take to improve our character.



### **Honesty**

How to be more honest:

- *See the world as it is.* If some aspect of your life or work is annoying or counterproductive or is just plain terrible, don't try to tell yourself 'it's not that bad'. Be honest and tell yourself 'This sucks! Enough is enough.' Take on the challenge of making it better. If you see others in pain around you, don't tell yourself 'they'll be OK when your

intuition says otherwise'. Be honest and tell yourself, 'it looks like they need a hand.' See the world as it is, in all its wrinkles and glory. See yourself for who you really are, with all your strengths and weaknesses. Honesty is the first step to positive change.

- *Always tell the truth.* Lying may seem like the less painful option, as we may avoid confrontation, but consider if that person did the same to you. Would you appreciate it? Would you trust them less if you ever found out the truth? Would you be as open with them in the future? If others see through your lies, they may think less of you and, given your actions have sanctioned the behavior, they may be more likely to lie to you. Be the example you want to see in those around you.



## Humility

How to be more humble:

- *Consider the perspective of others.* Each of us is unique and special, no doubt, but we're seven billion unique and special people. Billions of people know nothing about you, and may never know anything about you. But, that's ok. The goal of life is not to get everyone to take notice of you, because you're not the star of the show. Whether you're a theist (God is the star), a humanist (humanity is the star), or

an atheist (there is no star), in all cases you are not the star. Despite our disagreements, we have an almost universal human understanding that we're not the most important people on the planet, when compared to others. There are just a few of us that get big heads once in a while. The problem with trying to be the star is that we can lose track of the importance of serving others to make the world a better place. In other words, we lose track of our humanity. If you wish to be served by others, serve first. If you wish to be noticed by others, notice them first. If you wish to be admired by others, admire others first.

- *Get curious, and tell better stories.* Become genuinely interested in other people. You and I are interesting, no doubt, but the world is even more interesting by a factor of several billion. Find out about the lives of others, learn their stories, and then share these stories with those around you. We all love a good story, and stories can come from anywhere and anyone.



### **Being Nice**

How to be a nicer person:

- *Always Be Serving (ABS).* There's a famous scene in the movie *Glengarry Glen Ross* where Alec Baldwin, playing the

hard-nosed sales manager, says to his team “ABC: Always Be Closing”. He goes on to say, in so many words, that every interaction is about trying to get a prospect to buy what we have to offer. The problem with this thinking is that it’s all about the sale and not necessarily about what others want or need. In contrast, try the ABS approach, Always Be Serving. In every interaction, ask yourself: “From what they’re sharing with me, how can I help them? From what I know about them, how can I serve them?” If you don’t know what they need, strike up a conversation and get to know them. If you can think of the nicest person you know, they were probably operating on the ABS mentality, i.e. listening, asking others about themselves, and helping others. Do the same and you’ll have more thank-you’s and better stories.

- *Help others for the joy of helping.* If you only help others if you think they’ll help you, you’ll be sadly disappointed when they don’t reciprocate. Fortunately, the joy of giving is real and it’s free if we consider giving can be as little as just listening or offering some of our time and skills.



### **Self-Sacrifice**

How to be more self-sacrificial:

- *Sacrifice for a worthy cause.* We’re pretty good at sacrificing our time and money; it’s just that we may not always be sacrificing in alignment with our values. Ask yourself: am I generally sacrificing (spending) my time for myself, or for others? Am I generally sacrificing (spending) my money on

myself, or for others? In what ways am I using the time and money that I have to make the world better?

- *Sacrifice so that you can sacrifice another day.* I've seen volunteers run themselves ragged in community service projects, losing hours of sleep as well as their health. Sacrifice doesn't need to be fun all the time, but it should be sustainable. Sacrifice your time, but not your health. Take care of others, and yourself.



### **Positivity**

How to be more positive:

- *Expect the best in others.* When we expect the best in others, it's surprising how often others are at their best. Part of displaying this expectation is a positive attitude toward life. It doesn't take much, either. A smile, a reassuring word, and a belief that for the most part others around us are genuinely nice people.
- *Take time to be grateful.* From the air we breathe, to the beauty of a sunset, or a walk on a sunny day, these are all things that we didn't need to ask for but we get to freely enjoy. Taking time to be grateful, either at the beginning or end of the day, has significant benefits for your well-being

and mood. We can lose our job, but we still have our health. We can lose our finances, but we still have our minds and our determination. There's almost always something for which we can be grateful.



## Empathy

How to be more empathetic:

- *Focus on the pain points of others.* Although it's easier to turn a blind eye to the pain of those around us, the pain remains nonetheless. Ask yourself: are others frustrated with something that I can help them with? Do they need a helping hand or an ear to listen to their story? Do they need advice, or simply reassurance? Don't wait until things get worse, or someone reaches out to you. Do your best to seek out the pain first.
- *Take time to reflect on the goals of others.* Sometimes others do hurtful acts not because they want to be hurtful, but because it's the only way they know how to get what they need, whether it's attention, affection, recognition, or purpose. When you recognize someone crying out for one of these basic human needs, consider how you can help them achieve it in a way that helps them as well as those around them.



## Tool 10: Checklist for Managing a Process Improvement Project using Lean

*Lean* is a powerful tool to reduce wasted effort in your work processes, improve the satisfaction of your clients, and make work generally less stressful and more enjoyable.

The following is a suggested list of actions to consider when managing a process improvement project using the *Lean* approach.



### Planning your project

- ✓ **Pick your process:** Identify the work process you want to improve.
- ✓ **Identify your sponsor:** The Sponsor is the one who will give you the green light to start, and the OK for any final report or deliverables. They'll also help your project to receive any necessary funding or staffing. You can ignore this step if you're just doing this project for yourself.
- ✓ **Gather the data:** Gather all existing information on the process. This includes: the steps involved, any existing

process diagrams, related procedures, a list of the people involved, related tools and templates, data on the duration of the process and any individual steps, the level of satisfaction clients and employees have with the process, etc.

- ✓ **Hold kick-offs:** Hold meetings with all individuals that have a part to play in the process. These meetings may be one-on-one or collective, and they should include any staff involved, any supporting players (e.g. finance, human resources, etc.), and any clients that benefit from the results of the process. The purpose of these meetings should be to validate that you have accurate existing data regarding the process, and to explain the approach you'll use for the project.
  
- ✓ **Identify risks and success factors:** As a group, identify the key success factors for the project. What goals do you, the *Project Sponsor*, and the other stakeholders, want this project to achieve? Include these goals in your project documentation. Consider what could go wrong, e.g. staff unable to participate due to busy schedules, and identify mitigating strategies to stay on track.





## Executing your project

- ✓ **Create a current state map:** Create your official ‘current state’ map (or diagram) of the existing process. Share this version with stakeholders to ensure everyone is on the same page. This map should include all steps in the process, who performs each step, how long each step takes, as well as any associated costs. Preferably, use standard roles, e.g. junior accountant, senior programmer, as opposed to specific individuals’ names. Individual staff come and go, but the process should remain agnostic as to who is in a particular role at any given time.
  
- ✓ **Schedule and hold process improvement sessions:** Schedule a series of one-on-one and group ‘process optimization’ sessions with all those involved in the current process. During these sessions, consider the following agenda:
  - Introduction and explanation by management for why the process is being improved. Example reasons: staff complaints, customer complaints, a general desire to leverage the smart ideas of staff, to be faster or better, etc.

- A more in-depth discussion of what *Lean* is, how it works, and the various types of waste. For content on this, see *Chapter 14: Streamlining Your Work and Life*.
  - A silent brainstorm, followed by a group discussion on all areas of waste staff currently identified in the process. Staff should also brainstorm ways to improve the situation, either for a particular step or for the process as a whole. Your stakeholders live and breathe this process, so they'll invariably have comments and suggestions. You may wish to separate the problem identification and solution development brainstorms, but generally participants like to do both simultaneously.
  - To support idea generation, consider using colored sticky paper with one sticky per idea. Sticky's can then be grouped by waste category or problem area for ease of group discussion.
- 
- ✓ **Summarize feedback:** Summarize all problems identified and ideas generated into a single report that can be reviewed for any inaccuracies. Collect any additional feedback.
  - ✓ **Develop recommendations and future state:** Develop a report which examines the top issues and solutions

presented by staff. Summarize the top recommendations as both a list and a proposed ‘Future State’ map assuming all top recommendations are fully implemented. Assess what impact the recommendations would have in terms of time and cost savings. Have these documents reviewed by the group, then approved by the management team responsible for the process.

- ✓ **Implement new approach:** Implement recommendations, either as a pilot project for testing, or for full roll-out. Monitor for successful implementation and adjust approach as needed.



### Closing your project

- ✓ **Confirm goals have been met:** Identify if all project goals have been successfully achieved. If not, provide recommendations for next steps.
- ✓ **Discuss lessons learned:** Identify what worked well, and what could be improved. Share these ideas with the group to solicit additional suggestions. Store findings on file for others in the organization to consult for future projects.

- ✓ **Archive documentation:** Save all project documentation, templates, presentations, reports, and maps in a location that is easily accessible to all staff.



## **Tool 11: Checklist for Work Life Automation**

So much of what we do is manual and repetitive, but there are numerous ways we can automate these tasks with a little technology and creativity. Automation is an excellent way to boost our productivity, reduce the time to create what we'd like, and make more time for what matters most.

To make the most of your time, consider the following automation strategies:



### **The Morning Routine**

Many of our morning tasks can be done the night before, when we're less hurried and more able to think critically about what we need. I don't know how many times I've forgotten my work pass, cell phone, keys, and even my wallet as I race out the door, causing me to lose precious time backtracking to pick up forgotten items. After one too many of these incidents, I learned I needed to do things differently. This is what I now suggest to 'automate' your morning routine:

- ✓ Plug-in and charge all devices you'll need for the day, i.e. laptop tablet, and smartphone. To make the most of your commute, load up a podcast or audiobook. Better yet,

subscribe to your favorite podcasts so the latest episode is downloaded automatically to your device.

- ✓ Make your lunch, as well as any mid-morning and mid-afternoon snacks. Some quick-to-prepare suggestions:
  - A container of roasted almonds.
  - A container of dried peaches and apricots.
  - A modern ploughman's lunch (e.g. sliced summer sausage, cheese, bread, pickles, cucumbers, tomatoes, carrot sticks, and a small container of hummus).
  - A container of yogurt with maple syrup or honey, and a sprinkle of chia seeds, hemp hearts, or sliced almonds.
  - A large re-usable container of water or light juice.
  - A re-usable single-use coffee pod filled with fresh grounds for single-serve coffee machines at work. Keep this one in its own sealable container to keep things clean.
- ✓ Lay out your outfit the day before, typically ten minutes before bedtime. This includes socks, shoes, pants,

undergarments, shirt, belt, and suit, dress, or jacket. If you live in a climate where the weather varies greatly, you may want to check the forecast beforehand.

- ✓ Ensure your purse, carry bag, and/or pockets, contain anything you'll need for the day, i.e. car keys, wallet, change, notepad for jotting ideas, etc.
- ✓ Set your morning alarm and glance briefly at your task management system and calendar for any upcoming tasks or events for the day. Plan accordingly. For example, if you'll be going to the dry-cleaners, make sure your clothes are loaded in the trunk. These types of activities are typically the most likely to be forgotten in the morning rush as they differ from your routine.



### **What about technology?**

There are some pretty cool ways you can automate your morning further with technology, such as with “if this, then that” routines and remote-scheduled lights, coffee machines, and showers. That said, not everyone has the time to learn how these, sometimes bewildering, systems work. If you're adventurous and tech-savvy, go for it! Just be sure to run the numbers in your head to see if that new gadget will save you the

time you want given the up-front costs and effort.



## The Daytime Routine

If you're an information worker, your day probably consists largely of (a) meetings, (b) receiving and writing lots of e-mails, and (c) using your computer and brain to make things happen. So, let's look at each:



## Meetings

Traditional meetings can waste countless minutes per day. From the time it takes to get dressed and out the office door, to the travel time by foot or by taxi, to waiting for the meeting to start, to waiting for your turn to contribute your thoughts, and then waiting for participants to get back on track to bring the meeting to a close. There is a better way. *E-mail*.

E-mail gets a bad rap for its abuses, but if used wisely it can be an effective meeting replacement. Here's how:

- ✓ **General status updates:** Replace any 'status update' meetings with a request that all members send a quick reply to an e-mail you send with their stats and notes in bullet form. Add this information into a document and send out an e-mail to the group with a link to the file. If you do need to



have a back-and-forth conversation about one of the projects in the update, hold a specific meeting on the topic.

- ✓ **Management updates:** Replace any ‘management update’ meetings you have with a quick e-mail summarizing the key points from management and an open invitation for anyone to contact you if they have any questions. If one of the topics needs back-and-forth discussion, schedule a meeting on the topic.
  
- ✓ **Travel time:** Videoconferencing also gets a bad rap for a long history of being cumbersome, unreliable, and at times annoying. Today, however, it’s as easy as opening up a Skype, iMessage, or Hangouts window and picking the meeting attendees by name. You still need to set up your microphone and camera beforehand, but this is much easier than it used to be with conference lines that needed to be booked, phone numbers to call, and host/participant codes that would get lost in the mail. By taking just a few minutes to setup these tools, you can save hours of travel time for you and your stakeholders.



## E-mails

E-mail is all about processing. This includes (a) identifying what an e-mail means to us, e.g. information-only, task, solicitation,

etc., and then (b) determining how it should be managed, e.g. reply, forward, move to folder, delete, etc. Given that we perform these tasks dozens of times a day, there's welcome relief in the form of algorithms. Algorithms are essentially 'mini automators' that take multi-step or manual tasks and make them a single operation. Here are a few you can use to become an e-mail pro:

- ✓ **Filters:** Filters ensure your inbox is only filled with mail you want to see at any given time. For example, let's say I know all e-mails from Jane or all e-mails with 'Status Update' are status updates for Project X. I can setup a filter to have these messages automatically sent to a separate folder and never see them in my inbox. Further, I can review them at my own pace later in the week, and they won't be mixed up with any higher importance or urgent e-mails. The way to setup filters is always changing, but you can find simple instructions by searching "Setup filters for Outlook", "Setup filters for Gmail", or "Setup filters for Apple Mail" depending on your mail program.
- ✓ **One-click actions:** One-click actions are, as one might guess, about turning multi-step routines into a series of single clicks on the keyboard. Think about how we generally process e-mail:

1. We see a big list of all our mail.

2. We move our mouse to one of our items and click to open.
3. We review the item, then click the 'delete' button, or we close the message and drag it to a folder (or tag it) for reference.

With one-click actions, we can reduce all of this mouse swiping and button pressing with a single click of the keyboard. For example, we can press 'o' to open a message, 'd' to delete it, and 'f' to file it to our favorite folder. As quickly as we can type 'o' then 'd' or 'f' while scanning a message for relevant information, we've gone through the entire process. We can even tell our mail program to automatically open the next message in our inbox the moment we process the previous one, so really we'd only be pressing 'd' or 'f'. You'd be amazed how much time this saves, allowing you to burn through your e-mail. Here's how I like to use this in Google's Gmail, once the feature is enabled:

1. I press 'o' to open the first message in my inbox.
2. I scan it and add any tasks to my to-do list (a notepad file)
3. I press 'd' to move it to my trash bin (so I don't process it twice) or 'f' to store it in a reference folder.

That's it! It's now out of my inbox and any work needed on it is in my task management system. My program will then move to the next message and I repeat the process. If I need to reply to someone, that task is acted upon when I'm ready to do so and I just open the e-mail in my reference folder. I know I need to do this, not because an e-mail is sitting in my inbox as a reminder, but because the task is prioritized and categorized. This means I only act on items that are of highest priority at any given time. As with filters, the way to setup one-click actions is always changing. To find quick setup instructions, search for "Setup keyboard shortcuts for Outlook", "Setup one-click actions for Gmail", or "Setup keyboard shortcuts for Apple Mail" depending on your mail program.



**Using your computer and brain to get work done:**

Fill in the following fields to reflect on how you could best automate your specific work.

In any given week, the most repetitive activity I perform is (insert activity).

To complete this activity I do the following actions: (insert actions).

In any given week, the activity that requires the *least* amount of skill I perform is (insert activity).

To complete this activity I do the following actions: (insert actions).

In any given week, the activity that is most based on executing a specific set of clearly-defined rules or procedures is (insert activity).

To complete this activity I do the following actions: (insert actions).

In any given week, the activity that requires the most amount of sifting through large amounts of text-based or numeric data is (insert activity).

To complete this activity I do the following actions: (insert actions).

Examine the specific steps you identified for each of the four areas of potential automation. Can any of these be performed by:

- A computer program with the right set of data?
- A virtual assistant in a separate time-zone while you sleep?
- You, but with help from a computer (if not already the case)?
- You, but with help from an algorithm (if not already the case)?
- A virtual assistant, with the help of a computer program?
- Customers that would get more satisfaction if they did it?
- Customers that would get a product discount if they did it?
- You, but with help from your customers?
- Suppliers that would get a more favorable rate if they did it?
- You, but with help from your suppliers?
- A community of volunteers that enjoy this to improve society?
- You, but with help from volunteers?
- A community of enthusiasts that enjoy this for the challenge?
- You, but with help from enthusiasts?
- A community of gamers that would do this for fun if gamified?
- You, but with help from gamers?

Based on the analysis above, identify the processes or steps below that could be potentially automated or semi-automated. For each, explain how this would work in your own words:

1. Automated process name.
2. How it would work.



## Tool 12: Super Simple Daily Check-In

**Daily Check-In** (e.g. 10 min. @ 10 pm)

1. **Open calendar** and schedule the no. 1 task to complete tomorrow. Schedule it at a time and location with minimal distractions and high energy. Next, schedule the remaining tasks to complete tomorrow.
2. **Open to-do list** and remove completed items from the day. Add any new items for the coming days.
3. **Open priorities and goals list** and reflect on how you moved forward on your goals and priorities today. Consider priorities for:
  - Career and Current Work
  - Health and Fitness
  - Finances and Financial Security
  - Home and Family
  - Relationships and Friends
  - Spirituality/Well-being and Service to Community

As part of your review, assess whether the activities scheduled for tomorrow adequately support your goals and priorities. If not, adjust your schedule for the coming day.



# 17

## Next Steps

*“Your work is going to fill a large part of your life, and the only way to be truly satisfied is to do what you believe is great work. And the only way to do great work is to love what you do. If you haven’t found it yet, keep looking. Don’t settle. As with all matters of the heart, you’ll know when you find it.”*

– Steve Jobs, American entrepreneur, businessman, and inventor

Now that you have your tips and tools, all that remains is to get going on your life’s work. Before you go, however, a few final words of advice, from someone who still makes mistakes each day.

First and foremost, *love what you do, in all areas of life*. If you reach the pinnacle of success in your career, but your family life is challenged, your life is not full. If you have a loving family but struggle to make ends meet because you dislike your job, life is

equally miserable.

We can do great things, but we need to remember that it's with balance that we find joy. By all means, lean in to your work. But lean in to your parenthood, your friendships, and your community both local and large. Be productive in what matters, no matter what this means to you.

Second, *never settle for the status quo*. Life is too short (it really is!) and no day is guaranteed. If your colleagues are frustrated, collaborate with them to make work better. If your customers are dissatisfied, ask them how you could do more. If those you report to are desirous of change, work to find a solution, and don't stop until you do.

Third, and finally, when you're at work, whatever work means to you, *give it your best at all times*. Push out distractions, manage procrastination, continue to learn, make smart decisions, set your goals, maintain your energy, work well with others, meet when it makes sense, influence when necessary, and above all, be nice to others. Do your best in all that you do, and the rest will follow.

A fulfilled life is a life of action. And so I deeply hope that you put into practice the insights presented in this book. Don't put this book down without first scheduling the actions you mean to take. I also sincerely hope that when you do realize your goals, projects, and dreams, that you share what worked with those around you to make the world a better place for all of us.

We all deserve to reach our full potential, to impact the world in our own unique way.