Bonni: [00:00:00] In today's episode of Teaching in Higher Ed number 64 I share about my weekly review process and how it has evolved over time.

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Bonni: [00:00:18] Welcome to this episode of Teaching in Higher Ed. This is the space where we explore the art and science of being more effective at facilitating learning. We also share ways to increase our personal productivity approaches so we can have more peace in our lives and be even more present for our students.

Bonni: [00:00:46] I know from so many of the e-mails I've been receiving from you and the comments on the blog and the podcast that a lot of you like me are back to school back to teaching again. I know some of you have year round schedules and you get frustrated with us talking about our new beginnings when yours just keep on going.

Bonni: [00:01:03] But for most of us it is a new academic year. And today I'd like to share a bit about a process that is derived at least in part from David Allen's book Getting Things Done and I've spoke about that before on the show. He recently revised it and the revision is absolutely fabulous.

Bonni: [00:01:23] I got a lot out of his original version but find that the new one is written more concisely and probably less. Theoretically it's a lot more of a tangible series of practices that you could put into place.

Bonni: [00:01:38] And one of the things that frustrates people about getting things done at least with the blogs that I've read and some of the people that have some criticisms about it is that it is viewed as a really hard to follow system with a lot of complexity and I will say that the principles of getting things done are not difficult to comprehend.

Bonni: [00:02:01] But if you were to try to all at once put into place the entire set of recommendations of practices that David Allen has in his book you would get frustrated. It's one of those things I suggest starting small starting with something that makes a difference and then growing from there.

Bonni: [00:02:18] And one of the things that I would suggest you could start with would be doing what he calls a weekly review. And I keep being tentative about saying it's directly from him. There have been a lot of great thinkers around time management and project management that have this idea of reviewing on a periodic basis and having a methodology for doing that.

Bonni: [00:02:40] One of the books I really enjoyed about this theme is called The Checklist Manifesto. And I've talked about that before on the show it's a wonderful book that encourages us to make more use of checklists and how that helps even when we theoretically should know what we have to do.

Bonni: [00:02:57] He gives the example of airline pilots going through their pre-flight checklist and how doctors and physicians actually lives are being saved today because of them following checklists which in some cases are as simple as having the operating team.

Bonni: [00:03:11] Each one of the individuals introduce themselves and talk about what their role is going to be in that particular surgery and then reviewing what the surgery is going to entail. And you would think that that seems a little too basic to be a lifesaving practice and actually you'd be wrong because it is an incredibly important lifesaving practice that's been put into place.

Bonni: [00:03:33] And he talks about that again more in the book The Checklist Manifesto what are the principles that David Allen talks about says Your mind is for having ideas not holding them. And when we put into place a weekly review it allows us to take a step back from all of the doing and all of this stuff that feels like it's being thrown our way.

Bonni: [00:03:56] And to do some reflection and also to do some what I would refer to as closing the loops where there are things that have happened maybe during the past week that we missed capturing somehow in our system and that gives us a time to circle back and to do that.

Bonni: [00:04:13] I had a friend who used to work for the David Allen Company of course David Allen is a great author. He also does a lot of consulting and

workshops himself and has an entire team of people that are dedicated to doing that too.

Bonni: [00:04:28] And she used to work for him and when she started out with the company I got to be her guinea pig and I got a little bit of free cotinine as she worked on honing her skills as getting things done coach and one of the themes that really stood out to me from that experience.

Bonni: [00:04:42] It was such a really pleasant experience was having a system you trust and the importance of doing that. And I can say that I really have a system that I trust today and it makes me when things do go wrong as they inevitably will.

Bonni: [00:04:58] Just having that to rely saying no I have stuff captured yes I can't get to it. When I had hoped to get to it. But at least I know just how big this beast is I at least I know that if things are falling through the cracks at least I know what they are. I have them captured somewhere and I can make plans for adjusting them when they turn out to not be realistic to get done on a particular day or a particular week.

Bonni: [00:05:23] Another thing that I really appreciated from her coaching was that it wasn't just that I received her coaching but also received a whole package of materials from their organization including what they are now calling the GTD Methodology Guides and these are just laminated half sheets of paper that have the different this is for you to walk through to be following various aspects of the Getting Things Done model the laminated guides include things like incompletion trigger lists and the purpose of these trigger lists are to do the mind dump that they talk about or the Mind sweep that they talk about where we get it all out of our head and we capture it into our system.

Bonni: [00:06:09] And he has just different headings that are there and questions that you could ask yourself to try to pull out from your brain. What things that you might not quite have captured yet also included in the this methodology guides is a weekly review checklist and that checklist of course is designed to coach you through the critical success factor of GTD that weekly review which I'm sharing about here.

Bonni: [00:06:36] And before we even get to the end of the show which I'll do an official recommendation then I would recommend picking up these methodology guides if you think it might be helpful to have just keep by your

desk to pull out when you're doing various aspects of getting things done. I have done it now for years and find them to be incredibly helpful.

Bonni: [00:06:54] They have been renewed since I purchased them or in that case was gifted them but I have actually purchased them for other people since then and I'm sure they are even better now. They're tied to some of his new language of things in the Getting Things Done. Revised book that I talked about a little bit earlier and all of these tools that I'm talking about we are here in episode 64 so if you'd like to access these things in the future you just go to teachinginhighered.com/64 and that is also where you can find a link to an article from Life Hacker.

Bonni: [00:07:30] And it's their guide to the Weekly Review and it'll walk you through a lot of the things I'm going to talk about in today's episode and have clickable links for you to access even more resources. So let's get to it. Now as far as the Weekly Review. This is something that I actually do almost every week I would say there are a couple of occasions during the summer when things weren't quite as busy when perhaps I missed a week I had the flu at some point in the last few weeks didn't quite get that weekly review done.

Bonni: [00:07:59] But actually even though I didn't do the weekly review when I was so terribly terribly sick I did go in and new that my system had captured everything that needed to happen that week. And it included that I had scheduled with Rebecca who was one of the recent guests on the Teaching in Higher Ed podcast.

Bonni: [00:08:21] And I knew that I had scheduled with her and this is just not going to happen because we're not going to be able to record a podcast while I've got the flu. Her name was Rebecca Campbell by the way on episode 62 and I was able to know that we had that scheduled. I was able to know that I wasn't going to fulfill that commitment and was easy to.

Bonni: [00:08:42] She of course was completely understood that and was able to reschedule it and take care of things. But if I didn't have a system I could trust if I hadn't been doing these weekly reviews I would not have been able to feel as much at peace that despite the fact that I wasn't able to watch the kids or do the things I would normally do during the summer weeks.

Bonni: [00:09:01] Despite that at least I knew that that the big big things were not going to fall through the cracks. So I've been doing this for a very long time again most weeks I do it I have a monthly review process that I do too. And I'm

going to talk a little bit about what David Allen recommends versus what I do because there's a couple of things that he does he recommends on a weekly basis that for me just aren't realistic to look at on a weekly basis that I bump to my monthly review.

Bonni: [00:09:28] So there are three big buckets of things that we want to accomplish in our weekly review. Number one we want to get clear and that's all about the process that we talk about in the quote that I read earlier your mind is for having ideas not holding them. David Allen says we've got to get all of that stuff out.

Bonni: [00:09:50] So that's getting clear is about dumping out all of the stuff from our brain but also dumping all the stuff out of our bags and out of her tuck the little receipts that are tucked in there or the little loose papers that are tucked in there. I'll talk about my process for getting clear.

Bonni: [00:10:05] The second thing is get current. And in that process it's all about bringing up to date our calendars our projects are any checklists that we have things that are on checklists that type of thing and then lastly we get creative.

Bonni: [00:10:22] We don't want to forget about the aspect of it's not just about taking care of checking the boxes that are pre-defined by other people which comes a lot of times through email. Of course phone calls too but but e-mails where we get into this rut sometimes but we also want to be thinking about our own careers we're going to be thinking about our research we want to be thinking about our teaching and getting more creative on that and having a time and a place for doing that.

Bonni: [00:10:51] So that's what I'm going to walk you through. Now what I do to get clear what I do to get current and what I do to get creative. Let's start with the Weekly Review aspect of getting clear. The first thing that I do is to process all of my different inboxes and my inboxes.

Bonni: [00:11:10] Sometimes I mean a physical inbox. I have essentially two physical inboxes. I have a office at the university where I teach and there's an inbox there. There is an inbox that is in my home office here but there's other places where things may wind up too.

Bonni: [00:11:30] If a student were to hand me something in a class that would go into a folder that is inside of my work bag and I always try to make sure it goes into a folder and not into the bottom of the bag because on more than

one occasion I have thought that I have lost a letter from a student and it was actually crumpled up into the most magnificent crumple at the bottom of the bag that it could not even be seen from looking in the top of the bag it was so crumpled I had to learn my lesson the hard way.

Bonni: [00:11:58] I always put things in folders. If I'm on my best behavior and then occasionally here at home you can imagine this My office is on our third floor. It's essentially a third floor loft office and occasionally things get put at the bottom of the stairs completely understandably so that would be another inbox that I have to.

Bonni: [00:12:17] And these are the various physical inboxes that I might need to process through. See what's there. I've talked about this app before on the show but I'm just going to mention it in case you are a recent person who started listening. I am not a big paper person and anytime I can quickly take paper and turn it into something electronic that makes me really happy and the faster I can do that the better.

Bonni: [00:12:44] The app that I like to use for that is called Scannable. There are of course a lot of these apps that exist to scan things scan physical papers and to save them somewhere. The reason I like scannable is that it's made by Evernote.

Bonni: [00:13:02] And therefore it makes getting a document into Evernote a relatively easy process and most scannable it's as simple as opening up the app placing whatever paper it is I want to capture on a desk. If that desk is a it is a dark service. Even better because it's looking for it's automatically going to erase the background.

Bonni: [00:13:23] As in the desk and it's only going to capture the paper and it's automatically a straight net and it's automatically going to adjust the lighting of the phone and the the the darks and lights on the actual image that it's creating to be very readable and a test. This fast just two days ago I was at my office where I teach and there were oh I know what it was I was I was applying to get some professional development funds and I wanted to make sure that since recently our provost's office moved.

Bonni: [00:13:58] I wasn't sure if I take this physical copy if maybe it gets lost I wanted to make sure I also had a electronic copy of the document I was about to submit.

Bonni: [00:14:07] So I just took those four pages and I quickly had one on the dark surface. It got captured and I moved it off to the side the second one moved it off to the side. The third one moved off to the side. The fourth one moves it off to the side and it instantly all got saved in Evernote and it did ask me which folder I wanted to save it in.

Bonni: [00:14:28] But because I like fast capturers I save it all into the inbox and then during my weekly review that's when I go through and process those virtual inboxes. So I would try to take everything that I can that I receive in a physical copy and make it electronic and if there's no need to save that then that document either goes in the trash or it gets shredded if need be.

Bonni: [00:14:53] We have processing all of those physical inboxes that I talked about. But then there's processing all of the electronic inboxes. My task management system that I use called Omnifocus. It has its own inbox and I will go through the inbox and I will sort things into projects and add any due dates on them or add any what they call deferred dates which is basically I'm not going to see it again until that day after day. And with Omnifocus that's all good and well to only do that once a week. Except for if something is urgent than actually stop at that time and put in the necessary details.

Bonni: [00:15:31] If it's something that can't wait until I do my next weekly review I also process all of my inboxes for email so I have a personal e-mail that's also professional consulting type email. I have a university email. I actually teach a couple of times a year as an adjunct in a doctoral program so I have an e-mail for that.

Bonni: [00:15:53] That doesn't take that much effort to clear out because only when I'm teaching does it get really busy. I also as I mentioned have an inbox for Evernote and I will go through and process the Evernote inbox and typically I might have anywhere from 7 to 10 items that are in the Evernote inbox that need to get cleared out.

Bonni: [00:16:12] I have a draft app on my phone and the drafts app is wonderful because it's also a really quick way of capturing things but I don't want to forget that some things there. Now one of the things I like about the drafts app is that it actually has the ability to turn on a badge that tells you how many drafts are sitting there waiting for you to attend to.

Bonni: [00:16:34] But I also of course want to capture that in my weekly review so I don't forget about doing that to one of the systems which I talked about

maybe six months ago on this show maybe longer was that I was not very good at remembering to go back to my voicemail if I had listened to a voicemail on my phone.

Bonni: [00:16:52] It's out of sight out of mind. It no longer has a badge that shows that there's a new voicemail because I've listened to it. So it's like having read e-mail versus an unread e-mail. And I would forget about it.

Bonni: [00:17:05] But on that show I said oh I need to add that to my weekly review. And in fact I did. And now I'm happy to report that it's no longer a problem. Of course the only problem would be if it was a call I needed to return urgently I would not get back to that until my weekly review but most phone calls I receive are not urgent. And if they are I can always put that in. My task manager right away and not rely on this methodology.

Bonni: [00:17:29] Another recent thing that I added to my weekly review is going in to process new bookmarks on Pinboard. Pinboard is the bookmarking service that I use I'm going along reading the news reading blogs. I use a program called Newsify and I've talked about that previously with Dave on a prior show but whatever it is I'm using to read. I've got it quick and easy to save. Bookmark to Pinboard.

Bonni: [00:17:56] But then I want to make sure and share the ones that I think would be particularly relevant to my community and so I'll go in there and I'll make sure that all the new bookmarks that I've saved have a tag associated with them. Want to make sure they're nice and categorized so I can make use of them in the future and then I will save some of them to my buffer account. buffer app.com.

Bonni: [00:18:23] I will save things there so that it spreads out my sharing throughout the week and people can enjoy those resources that I decide to share there. And then of course the last part of getting clear is that mind dump and that's where I go in and I might use those trigger lists that I shared about that the David Allen Company did.

Bonni: [00:18:44] I don't always find myself needing to do the trigger lists because sometimes it is free flowing and I'm able to have that information does come out of my brain by looking at various projects.

Bonni: [00:18:58] The Omnifocus app that I use also has a review process where you review various projects at either the same time or different times each week

you can set it up however you want to and that generates a lot of my mind sweep or my mind dump as the case may be.

Bonni: [00:19:14] That was getting clear. Now let's talk about how to get current one of the things I do as I go back and look at my prior week's calendar. And that's where I look and see. I think back to the classes that I taught that week I think back to any committee meetings that I had or department meetings that I had.

Bonni: [00:19:33] And are there any loops that are still out there any commitments that I made or things that didn't go well and I want to adjust for in the future and that's where I captured those in the form of actually the action items. It makes a huge difference to me to go back and look at that week and see if there's anything that needs taken care of.

Bonni: [00:19:53] And then for me timing wise what tends to work is to look forward to weeks in my calendar. I find that one week is not enough. One week I'm gonna find something that pops out next week especially because I'm responsible for. We've divided up the work in our household. I do the vast majority of the scheduling for our childcare.

Bonni: [00:20:16] We have a couple of gals who come in and watch the kids few half days are full days a week. And boy if that second week of something's fallen through the cracks there I'm going to want to know it so I can make any necessary adjustments. Call my mom Mom can you come up.

Bonni: [00:20:31] You know how some of you know how it is so that reviewing the calendar I look out two weeks and I look back one week and then I also review what's called a waiting list. If I have delegated something to someone then that goes on my waiting list or in some cases if I have a podcast guest who says I'd love to be on your podcast. That sounds great but I'm in the middle of a book deadline.

Bonni: [00:20:53] Can you get back to me in two months. I put them on a waiting list. In that case I'd defer it out until the two months so I don't even see it when I'm reviewing the waiting list until it pops up again. It's a really convenient thing. I also have where if I have said oh right now my husband Dave and I are thinking about going to see Tommy Emmanuel which I have recommended by the way a video on a prior show. Maybe you remember hearing his great guitar.

Bonni: [00:21:22] And we were thinking about maybe going down to San Diego to see him perform. And now I have in my at Dave agenda item on my task manager to talk to him about that and coordinate and see if we're actually going to try to do it in January. So that's a little bit about getting current.

Bonni: [00:21:39] The last part of the Weekly Review as recommended by David Allen is to get creative and here's my confession. I do not have weekly items associated with what he calls getting creative and that is reviewing the some day maybe list adding any new projects that need to be added or refining the system refining the system of the Weekly Review refining the system of the month to review just making sure that the GTD system is working well.

Bonni: [00:22:11] Why do we not do that in my weekly review. I just don't have that many things on my someday maybe list that it makes sense to review on a weekly basis. I would find that I would probably not take it as seriously as I do now and it just it just doesn't a good system for me.

Bonni: [00:22:30] So for me if I'm going to have these things that someday maybe that's going to be on a monthly basis and that's what I. I bump down that get creative category of things to a monthly review and I just really don't have that in the Weekly Review.

Bonni: [00:22:44] I might change that at some point in the future but that's just where things stand now. So I'll share just a little bit then about my monthly review. I have a get current where I look at all the project lists again and make sure that is there any new projects that should be added or ones that should be completed.

Bonni: [00:23:02] As an example I got the great satisfaction when the semester started. I have a category of things where it's prep this class so in this case PrepBUSN114-2015 Fall I have a project called PrepBUSN14-2015 fall and that project just got completed.

Bonni: [00:23:24] Then I have a project called TeachBUSN114- 2015 fall to me prepping for a class is things like the syllabus and things like the calendaring the the class planning system that I have and sinking it to the online calendar. Once that semester starts off and I begin teaching then the prep is over.

Bonni: [00:23:48] I mean obviously I still prep during the semester I cannot settle myself to and I can't stop tweaking my classes I don't mean that I don't prep every single week of classes. I just mean that that still then I call that the

teaching process. Even the preps that happened during those weeks so I have a projects list that I go and review from my monthly review.

Bonni: [00:24:09] I review the areas of responsibility. This is something out of the David Allen. But it also I took it from Stephen Covey early on looking at the different roles that we have in our life. Yes I'm a professor. Yes I'm on this committee yes I'm a member of a department but I also am a mother and am also a spouse and looking at those various areas of responsibility is helpful to do.

Bonni: [00:24:32] I review my goals I review our finances once a month looking at our budget. We use a program called Mint that helps us be able to do that. Among other things and I review next month's calendar and that's my getting current and then as far as getting creative reviewing those someday maybe lists which in my case I've taken the advice of some experts on time management and not kept those inside omni focus or in my case my task manager.

Bonni: [00:25:01] But it kept those in something else so I don't clutter that system up and keep it in Evernote and I will say that my someday maybe list is lean. These days I think probably it's partially lane because I save things in different places if it's a movie I want to see someday.

Bonni: [00:25:18] I save that on the Internet Movie Database count that I have. That's IMDB.com. They have a place for saving movies and TV and things like that that you want to watch. If it is a book that I want to read then I would save that on my good read account inside of my good reads account.

Bonni: [00:25:37] I have a books to read or something like that category that I keep updated. I also probably mix it up sometimes with my amazon wish lists too because I have a Kindle wishlist there 2 of books that I want to buy and read electronically and that is it as far as my monthly review goes.

Bonni: [00:25:56] And again that someday maybe list perhaps that's an area that I should improve. But as it stands right now I have a bucket that mostly remains empty and mostly I have other places for capturing the someday maybe. I think that maybe some of that is just having two small children and feeling like gosh someday maybe I'll take a nap and you know what I do get to take an amp because I have a wonderful husband and the ability to do that.

Bonni: [00:26:19] So it feels like life is complete. As far as that goes and then it's just a question of the Tommy Emmanuel concerts and whether or not we're

going to go to those. And I think we probably just capture those to do's because it would require buying tickets and arranging childcare and all that stuff.

Bonni: [00:26:33] And as I went up on the side the seats are going fast so you better move faster. We're going to make that happen and you shouldn't rely on a monthly review or even a weekly review. Probably this is the time in the show when I do recommendations and my recommendation for you is to give a weekly review a try for one month to try for a month habit where you schedule it you do it at the same time every week. You make it a commitment that you make to yourself.

Bonni: [00:26:59] And I'd love to hear back from you and hear and have you share how it goes. Maybe some of you could leave a voicemail or record yourself talking about how it went and I'd be happy to share those with the community so we can find out how to make use of weekly reviews in our process to ultimately like I say at the beginning of every show we want to be more present for our students.

Bonni: [00:27:21] And we want to have really the capacity to be able to do that. To do that. Well and one of the ways we can do that is by taking time out to reflect and see how were doing and not just spin the wheel like the hampster.

[00:27:38] This has been teachinginhighered.com/64. And if you would like to get feedback on this episode please do so. At teachinginhighered.com/64. If you would like to give feedback on this episode or really all the episodes. Maybe you have an idea for a guest speaker. Or a topic on the show or you can do that at teachinginhighered.com/feedback.

Bonni: [00:28:04] And it's so exciting to have the show growing every week. And one of the best ways for that to happen is for people to be able to discover the show. ITunes is a mystery but one of the things we know can bump up and make more people would be able to discover this show is by you grading or reviewing the show. So I'd really appreciate any of you who are up for doing that and can help pass the word along in that way. Thanks so much for listening. We'll see you around.

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