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Usually, when I coach a client around time and task management, we work top-down, from vision and values down to next steps. However, the top-down approach is only half the story. We also look at “bottom-up” task management, like the one described here, to ensure the client’s system is not the true villain.

The Inbox

How many messages are in your email Inbox right now? How many other Inboxes do you have in your life, such as an “I’ll get to these later” pile? I fret for people who misuse the Inbox as a place to store things-to-do because I did exactly that for many years. For me, and for most people, using the Inbox as an auxiliary (or primary) things-to-do list causes unnecessary stress. In the long run, it makes one less productive, less creative, and less able to adapt quickly to new circumstances.

In short, I think the Inbox is a terrible place to store things-to-do. Why?

First, the Inbox is undifferentiated, like a stack of paper. It is a list of senders, subjects, dates, and sizes. Do any of those columns tell you what your next action should be? Probably not. The email body sometimes tells you what to do, but often it does not. So the Inbox ends up being like a cloud of stuff, which you know you should attend to, but is chronically out of focus.

Second, even if a given next action is obvious or quickly discernable from the received email, are you in the right place and circumstance to execute that action? Ideally, you want to see things you can do at home while at home, calls you can make while you can make calls, and computer work while you’re at your computer.

Third, the Inbox tends to inflate. I have seen (with poorly disguised horror) inboxes with hundreds or even thousands of messages, many of which are unread. The bigger the Inbox, the more time-consuming it is to find a next action, the harder it is to recover a piece of information, and the less able you are to quickly determine the right next action.

When I think about big Inboxes, I think of the L’il Abner cartoon character, Joe Btfsplk, who was always followed by a rain cloud. The rain cloud didn’t help Joe, and it didn’t help his popularity.

Do we have a choice? We are bombarded with dozens, if not

hundreds, of emails daily (and I suspect there are people who get thousands). I have heard that some people change email addresses regularly, just to get a fresh start. Is that necessary? Of course not.

A good task management system has places for projects and tasks – appropriate places that allow you to scan, prioritize, and file. I draw heavily from David Allen’s book, *Getting Things Done: the Art of Stress-free Productivity*. Allen is very insightful about the essential ingredients of a successful task management system.

TIP Do the whole nine yards.

Be careful about partial approaches to task management. Why? Because you’ll miss the big benefit of your mind being freed up. As long as your mind knows that the system can’t be fully relied upon, your mind will be doing your system in duplicate (or trying to). When you get to the relaxation payoff, you’ll know it. You’ll feel it.

What are those essential ingredients?

1. **An Inbox.** Yes, you need an Inbox, a place for things to arrive until you can deal with them. But having as few Inboxes as possible is important. I have three: one paper Inbox in my office, one email Inbox, and a pocket-sized notebook to capture things to do as I’m moving around. If you don’t gather unaddressed items in just a few places, the tasks end up spreading – is your office your Inbox? Is your house your Inbox? So gathering unprocessed things to do in as few places as possible is key.
2. **Trash.** If an email or something coming at you has no next action and no future use, then trash it.
3. **A Current Action List.** Yes this is a “things to do,” but with a couple key differences. Make sure each item in your CAL is perfectly clear what the next action is. Even something as simple as “Make appointment with Jane” may not be actionable if you don’t have her phone number, if a third party needs to be involved, or if Jane is out of the country for three weeks. In these cases, the next actions are Get Jane’s phone number from Saskia, or Send email to Jane and Lenore suggesting conference call times. In the case when an action is not actionable until some time in the future, the action should be recorded in a tickler file.
4. **Tickler File.** This is where you store anything that must be done in the future, and cannot be done now. I have a separate category in Outlook for my tickler file and preface them with a YYMMDD, code so that they sort properly. There are some beautifully simple and effective ways to implement a tickler file with file folders, too.



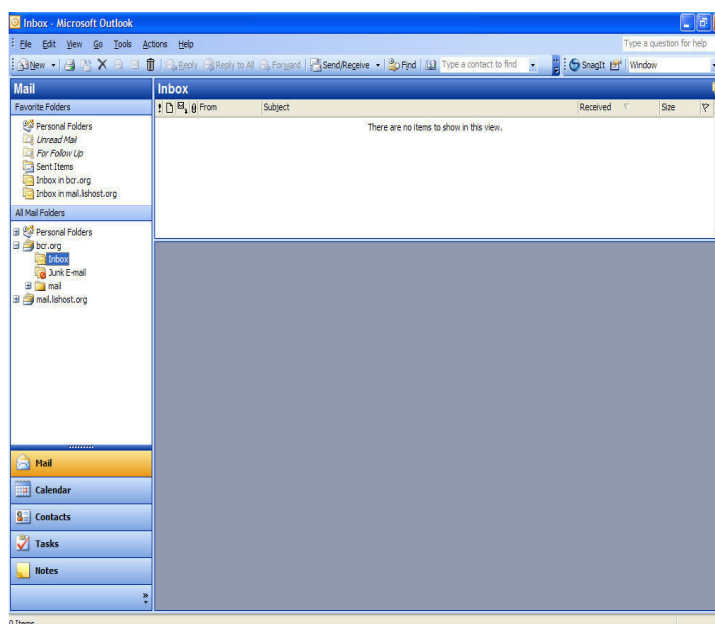
TIP Invest the time to get your task management system really shipshape. You could read *Getting Things Done* and *Ready for Anything* by David Allen. Also his website, www.davidco.com, has suggestions on how to implement his system in Outlook or Gmail. Finally, if you want support, guidance and/or cheerleading getting over the initial hump, give me a call, 902 488 6509.

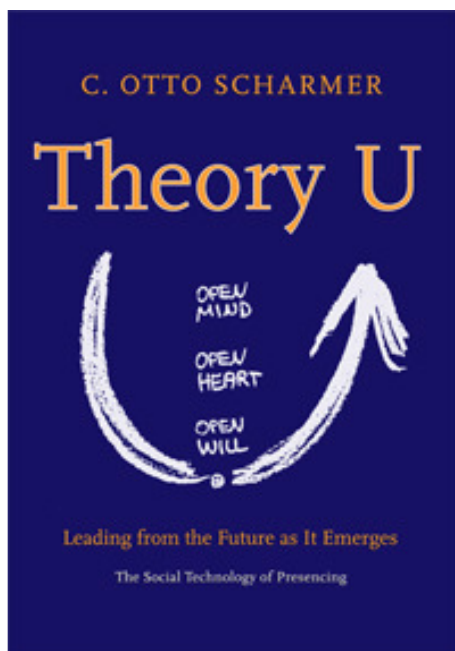
Does your mind keep reminding you of things to do because it doesn't trust your lists? Imagine what it would be like to free up that processing power for other things.

TIP Be prepared to be scared. If you've been relying on your Inbox to structure your time, you're in for a shock. The look of an empty inbox can take some getting used to. When you see the empty inbox, notice the feeling you get. If there is discomfort, tell yourself gently, "this is the opening for me to choose how to spend my time."

5. **Calendar.** For anything that happens at a specific time, it goes in the calendar. And by "specific time" I mean specific: meetings, appointments, planes to catch. I don't mean, "I want to complete this report next Tuesday." That is a task or project with a deadline or, worse, a hopeful timeline.
6. **Project List.** A project, by definition, is anything you plan to do that involves more than one step. "Write XYZ proposal" is not a task – it more than likely involves reading the RFP, inviting in subcontractors, meeting with subcontractors, drafting, editing, printing, and submitting. Projects generate next actions as you review them periodically.
7. **Reference files.** Ways to retrieve things that you may need in the future. I have email and paper files, and I will reference them in a task. For example: "Registration form in Legal/Professional file."

All this may sound pretty elaborate, but let me tell you what is really elaborate – a mind that has to keep reminding itself of things to do because it doesn't trust the systems it puts in place. Once your system really captures, processes and properly stores your tasks, you mind relaxes. Psychic RAM is freed up. Stress drops.





Theory U: Leading from the Future as it Emerges

By C. Otto Scharmer

I am sitting here at my laptop wondering, “Should I really recommend this 500-page book of very full, and sometimes very challenging, prose?” Many of my colleagues who know about *and even deeply appreciate* Otto Scharmer’s work through workshops, articles and other books have not read his seminal book, *Theory U*, released earlier this year. And I wouldn’t hold your breath for the movie. Or the Coles notes.

Theory U after all does tackle many of the major challenges facing the world at this time – everything from environmental crises to competition of world views to collapsing health care systems. The book also talks about the new kinds of organizational structures, leadership and dialogue that are needed to address those challenges. It also provides extensive guidance for those of us working within organizations and communities who know that genuine innovation is the only way forward.

What makes the book so challenging, aside from the length? It is a book about a theory, albeit a theory that has a lot of experience and research behind it. And a theory that has implications for leaders, managers, consultants and coaches. However, it’s not a how-to book, and it is largely left to the reader to translate theory into practice.

So what is Theory U? Theory U describes how people, groups and organizations cope with various kinds of complexity and truly innovate in the face of them. Theory U provides the roadmap (which is U-shaped, when represented pictorially) which helps practitioners steer clear of superficial solutions to complex challenges -- challenges that individuals, teams, organizations, and communities face everyday.

The simplest description of the U roadmap is in five steps:

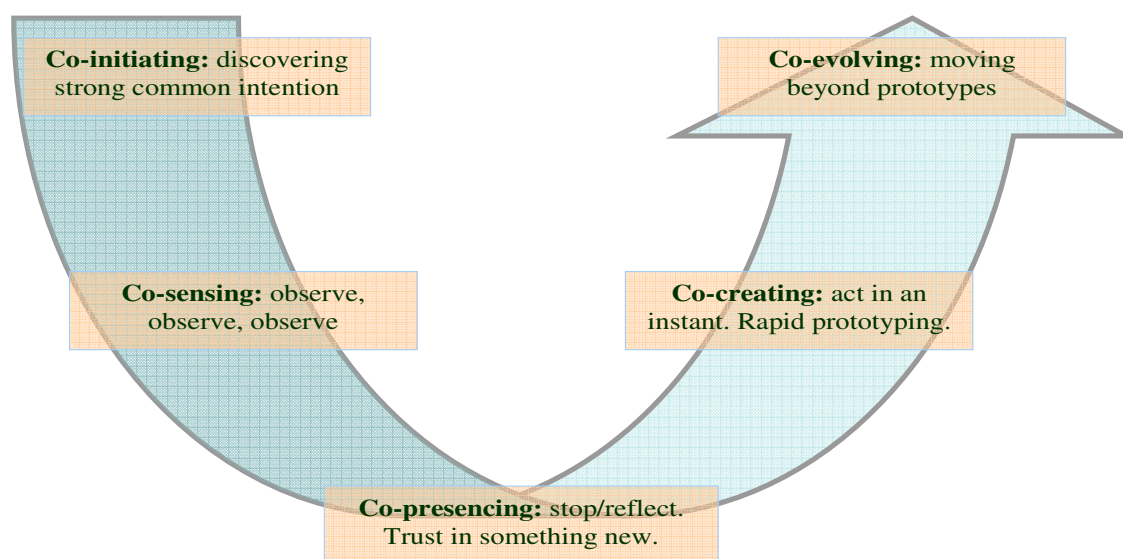
1. **Co-initiating.** It is important for at the very outset of a new project to stop and listen to others so that a strong, clear common intention is formed. You will need that strength of intention to help you stay on track.

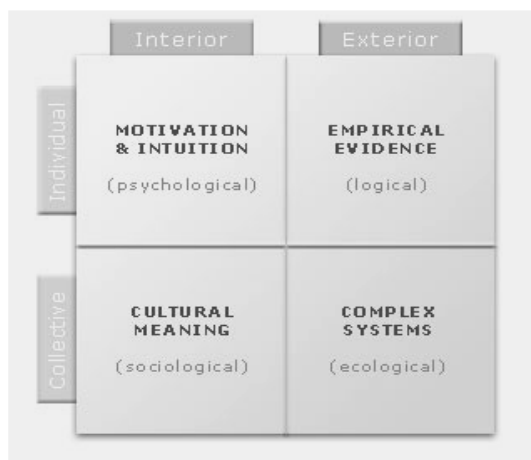
TIP Spend time at the beginning of any collaboration getting very clear on the intention. I make it a habit to ask or state at the beginning of a meeting what we are trying to accomplish. Cultivate a good nose for fuzzy intentions, and then find the skillful ways of encouraging others to clarify their intentions. For larger projects, intention setting may take several or many meetings.

TIP Go on learning journeys (**co-sensing**). One of the most powerful and effective ways to invoke fresh thinking is to organize a learning journey. Getting the team to experience parts of the system that they usually don't see is extremely valuable. Create situations where team members go to different places in two's and three's, and then pool their experiences. For more information on the art of the learning journey, give me a call. 902 488 6509.

2. **Co-sensing.** Scharmer says, "Observe, observe, observe. Go to the places of most potential and listen with your mind and heart wide open." He means "places" literally. Going into unfamiliar environments related to the challenge can teach you a lot. Avoid getting people's standard spiel by asking deeper, more personal questions. Find out what makes people tick.
3. **Co-presencing.** "Presencing" is a word Scharmer has coined to capture the experience of stopping to sense what is emerging, what is truly new. In the two previous steps, you have immersed yourself in the ideas, intuitions and feelings of your team members, and now is the time to stop and let go of trying to solve the problem. (Problem-solving tends to resurrect our habits.) Some people spend time in nature, some meditate, but unfortunately many people skip this step.
4. **Co-creating.** If we've done our homework in the first three steps, then something does come. And when it does, our job is to act without hesitation. This is the realm of rapid prototyping – "success through many failures." Most people want their first prototype to be a full success, which really slows things down.
5. **Co-evolving.** When you or your team has a number of prototypes, pilots, or microcosms under your belt, it's time to figure out how to roll out the most promising experiments on a larger scale. Generally this involves engaging a new group of stakeholders.

In the coming issues, I will return to Theory U and discuss ways it can assist individuals and teams facing complex challenges.





Where is the blind spot?

Ken Wilbur, author of *A Brief History of Everything* and many other works, has an enviable mind. A modern American philosopher, Wilbur has synthesized the diverse fields of physical and social sciences, psychology, and religion into a unified picture of human knowledge that he calls “integral.”

Central to Wilbur’s work is the notion of the four quadrants, with interior/exterior forming the horizontal axis and individual/collective forming the vertical axis. Thus, the upper left quadrant is the realm of “I” (individual interior). The lower left is the realm of “We” (collective interior), and the two right-hand quadrants are associated with “It” kinds of knowledge (exterior).

The I/We/It framework makes a handy checklist, I think. For any undertaking of any complexity, I think it’s helpful to check that each of the quadrants is ready to move in the desired direction. Usually one quadrant (usually an It quadrant) dominates our thinking. Let’s take climate change as an example:

“It” thinking: What technologies can supplant fossil fuels? How can we sequester carbon? Can we launch something to block the sun’s rays to buy us some time? How can we make cars more fuel efficient?

“We” thinking: What kinds of culture will support sustainable lifestyles? What kinds of conversation will help us develop and practice sustainability? How can we all pull together on this one?

“I” thinking: What kind of mindset will be needed to live in the sustainable future? What assumptions do I hold that are contributing to the planet’s unsustainability? How can I act as a part of nature, rather than as something alien from it?

As you can see, the three realms are very different, and none is inherently better than the others. Moreover, *all* will be needed to work with something as complex as climate change.

What are your blind spots for a challenge you’re facing? What questions, if asked, would make a big difference in your approach?

In my consulting, coaching and facilitation practice, I/We/It constitutes the most fundamental checklist of them all.

About CO-CREATION

I hope you enjoyed *CO-CREATION*; it is my intention that each issue be a useful, fun and thought-provoking resource. As a coach, facilitator and consultant to individuals and teams, my guiding principle is that the creative task be shared and cultivated in everyone involved. I firmly believe that the outcomes are better, particularly in the long run.

So here is my challenge to you, dear reader: What wisdom are you finding? Join in the co-creation of *CO-CREATION* by sending me your thoughts, articles, responses, and we’ll see where it takes us.

If you are interested in my coaching, facilitation or consulting services, here is how to get in touch with me:

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Bob