

## Personal Trigger List

### Objectives/Projects started, not completed

### Objectives/Projects that need to be started

### Commitments/promises to:

Other  
Spouse  
Children  
Family  
Friends  
Professionals  
Borrowed Items

### Projects: other organizations

Service  
Church  
Volunteer

### Communications to make/get

Family  
Friends  
Professional  
Initiate/Respond to:  
Phone calls  
Letters  
Cards

### Upcoming events

Special occasions  
Birthdays  
Anniversary  
Weddings  
Graduations  
Holidays  
Travel-vacation  
Social events  
Cultural events  
Sporting events

### R&D

Things to do  
Places to go  
People to meet/invite  
Local attractions

### Administration

Financial  
Bills  
Banks  
Investments  
Loans  
Taxes  
Insurance  
Legal affairs  
Will  
Filing

### Waiting for...

Mail order  
Repair  
Reimbursements  
Loaned items  
Medical data  
RSVPs

### Home/household

Landlords  
Property ownership  
Legal  
Real estate  
Zoning  
Taxes  
Building/contractors  
Heating/air-conditioning  
Plumbing  
Electricity  
Roofing  
Landscape  
Driveways  
Walls/floors/ceilings  
Decoration  
Furniture  
Utilities  
Appliances  
Light bulbs/wiring  
Kitchen things  
Washers/dryers/vacuum  
Areas to organize/clean

### Computers

Software  
Hardware  
Connections  
CD-ROM  
Email/Internet

### TV VCR

Music/CDs/tapes  
Cameras/film  
Phones  
Answering machine  
Sports equipment  
Closets/clothes  
Garage/storage  
Vehicle repair/maintenance  
Tools  
Luggage  
Pets

### Health care

Doctors Dentists Specialists

### Hobbies

### Books/records/tapes/discs

### Errands

Hardware store  
Drugstore  
Market  
Bank  
Cleaners  
Stationers

### Community

Neighborhood  
Schools  
Local government  
Civic issues

## Professional Trigger List

### Objectives/Projects started, not completed

### Objectives/Projects that need to be started

### Commitments/promises to:

Other  
Boss/partners  
Colleagues Subordinates  
Other people in organization  
"Outside" people  
Customers  
Other organizations  
Professionals

### Communications to make/get

Internal/External:  
Initiate or respond to:  
Phone calls  
Voice mail  
Email Pages  
Faxes  
Letters  
Memos

### Other writing to finish/submit

Reports  
Evaluations/reviews  
Proposals Articles  
Promotional materials  
Manuals/instructions  
Re-writes and edit

### Meetings that need to be set/requested

### Who needs to know about what decisions?

### Significant read/review

### Planning/organizing

Formal planning (goals, targets, objectives)  
Current projects (next stages)  
Upcoming projects  
Business/marketing plans  
Organizational initiatives  
Upcoming events  
Meetings  
Presentations  
Organizational structuring  
Changes in facilities  
Installation of new systems/equipment  
Travel

### Financial

Online banking  
Cash flow  
Statistics Budgets  
Forecasts/projections  
P&Ls  
Balance sheet  
Credit line Banks  
Receivables  
Payables  
Petty cash

### Administration

Legal issues  
Insurance  
Personnel  
Policies/procedures

### Customers Internal

### External

### Marketing Promotion Sales

### Customer Service

### Systems

Phones  
Computers  
Equipment

### Inventories

### Supplies

### Office/site

Office organization  
Furniture/decorations

### Waiting for...

Information  
Delegated tasks/projects  
Completions critical to projects  
Replies to:  
Emails  
Calls  
Proposals  
Requisitions  
Reimbursements  
Petty cash  
Insurance  
Ordered items  
Items being repaired  
Tickets  
Decisions of others

### Professional development

Trainings/seminars  
Things to learn  
Things to look up  
Skills to practice/learn  
Computer training  
Tape/video training  
Resumes  
Outside education

### Research-need to find out about...

### Professional wardrobe