



## What are your Collecting Points? Are they serving you or slowing you down?

Tasks come at us from many different sources and we collect them in many different locations. When I ask clients how many places they collect the information that they need to act on, they say five or six. But upon closer examination, it's usually more like 25-35 places! This awareness surprises most people and elicits an immediate response: "Wow, I need to consolidate, that's overwhelming!"

To reduce this kind of overload and to make it easier to prioritize your tasks, I recommend that you do the following three things:

1. Identify how many Collecting Points you currently have
2. Decide how to consolidate your Collecting Points
3. Set up new Collecting Points

### Step One: Identify how many Collecting Points you currently have

Collecting Points are physical locations that store information which is either useful for completing current tasks, or for use in the future. It is important to identify exactly how many physical locations you're using to capture data. Too many Collecting Points can dramatically affect your ability to prioritize your tasks effectively and can be sources of distraction, stress and overload.

Imagine for a moment that you want to prioritize your actions. The first step is to review all your

### A list of the most common Collecting Points :

- E-mail inbox at home
- E-mail inbox at work
- Voice mail at home
- Voice mail at work
- Mobile phone voice mail
- Faxes in the printer
- Your head
- Kitchen counter
- Dining room table
- Refrigerator door
- Sticky notes on computer monitor at home
- Sticky notes on computer monitor at work
- Microsoft ® Word documents
- Pockets
- Your car(s)
- Briefcase
- Paper calendar at home
- Digital calendar at work
- Microsoft ® Excel spreadsheet
- Web site
- Microsoft ® Project plans
- Notepads
- Notebooks
- Wallet
- Papers on your desk at work
- Papers on your desk at home

tasks so that you can then put them in priority order. If your actions are in multiple locations, then you need to go to every location to find out what you have to do. Then and only then can you begin the process of prioritizing; otherwise you are prioritizing in a vacuum. If your Collecting Points are spread out in 25 or so different locations it gets really hard to do this and most of us, being the humans that we are, won't do it because it's too much work.

To establish how many of these points you have, review the list at the right and check off any of the Collecting Points that apply to you. Feel free to add additional ones that are not on the list!

### **Step Two: Decide how to consolidate your Collecting Points**

Once you realize that you have a lot more than five or six Collecting Points, I am sure you will have the same response as most of our clients: "I have to consolidate, this is way too much!" I recommend that you consolidate down to five to ten Collecting Points. The five Points I suggest are:

1. E-mail
2. Voice mail
3. Microsoft OneNote/notepad
4. Categories: (none) in the Microsoft Office Outlook TaskPad
5. Paper inbox and portable paper inbox

#### **1. E-mail**

If your company policy allows personal e-mail, I recommend that you transfer these messages so that they download into your work e-mail inbox. This results in one Collecting Point instead of two. However, if your company policy does not allow personal e-mail, you will need to maintain two e-mail Collecting Points.

- Bulletin boards
- Inbox on your desk
- Night stand
- White boards
- Your credenza
- Microsoft ® OneNote ®
- Microsoft ® Office Outlook ® TaskPad

---

### **Outlook ® Tip:**

#### **Setting Up Categories: (none) as a Collecting Point**

1. Click the Folder List button in Outlook and click either the Tasks folder or the Tasks icon at the bottom of the list
2. Right-click the gray column-heading button labeled Subject, and select Customize Current View
3. In the Customize View dialog box, click Group By
4. In the Group items by section of the Group By dialog box, click the drop-down menu, and select Categories
5. Click OK
6. Click OK again

When you enter a new task, the task will automatically show up under the Categories: (none) list.

---

We have worked with clients who have as many as seven different e-mail addresses and, as you can imagine, each one of these addresses has to be downloaded separately which requires a lot of time and effort. Therefore, anything you can do to consolidate these Collecting Points will make a positive difference.

## 2. Voice mail

Although some of our clients have as many as six voice mail boxes, most of you will only have three: home, work and mobile.

I have been able to consolidate these down to one voice mail box. I removed the voice mail box on my work phone and directed all incoming calls to my assistant's phone. I forwarded all my incoming calls from my home phone to my mobile. I now have one voicemail box instead of three. Some executives have their assistants download their voice mail at work and put the messages into their email. This allows them to remove one Collecting Point. Again, anything you can do to consolidate will make a difference.

## 3. OneNote/Notepad

Most of us have to take meeting notes of some sort. My first recommendation is to use Microsoft OneNote if at all possible. This eliminates most of your paper notes; however I still carry a small wallet-sized notepad for those spontaneous notes over dinner! For those of you without OneNote, a notepad is still extremely useful. First you'll want to identify how many notepads you have; I've seen clients use as many as 11 different notepads. This increases your Collecting Points considerably and requires a great deal of discipline to remember which notepad to take to each meeting and which notepad to go to for relevant notes. Therefore, I recommend using one physical notepad and taking your notes in chronological order. List action items

## Another Article by Sally McGhee

Microsoft recently published Sally's latest article, "[Process and Organize Your E-mail to Increase Productivity](#)." It's a great, quick review of McGhee Productivity Solutions' "Four D's for Decision Making."

---

## MPS Tips and Tricks on Microsoft.com!

We were recently invited to provide some easy-to-use tips and tricks for e-mail management for Microsoft to post in the Information Worker section of Microsoft.com. You can review these six key skills by following these links:

[Format e-mail messages for clarity](#)

[Create an effective reference system](#)

[Set up folders for an e-mail reference system](#)

[Process and organize your e-mail to increase productivity](#)

[Write e-mail messages that get attention](#)

[Respond effectively to e-mail](#)

with a check box or an arrow symbol and as soon as you get back to your computer, transfer these action items into your Outlook TaskPad so they are not hidden in the notepad. Once your action items are removed from your notepad, your notepad becomes part of your reference system and not a Collecting Point.

#### **4. Categories: (none) in the TaskPad**

Categories: (none) is an extremely useful digital Collecting bucket because whenever you are at your computer, this Collecting Point is available. As you know, we all keep way too much data in our heads and this Collecting Point is a great place to download all these items so that you can capture them in one central location. You can also use Categories: (none) to capture voice mail messages so that you can delete them from voice mail and have them in a digital form. When they are in a digital form it is much easier to transfer them onto the calendar to do on a particular day, or to later delegate them via email. To set up a Categories: (none) Collecting Point see the Outlook Tip in this newsletter.

#### **5. Paper inbox/portable paper inbox**

Some of us are still living in a paper world because we like it, and there's nothing wrong with that. However, are your papers controlling you or are you controlling them? Has your desk become a Collecting Point? How about your kitchen counter, your briefcase or your credenza? I would suggest you create one Collecting Point for your papers instead of having multiple locations. You can buy a physical paper inbox and then move all your papers from the alternative Collecting Points into that single location. I know, I know — it's a bit scary (and your inbox might initially look like the Leaning Tower of Pisa). But you will immediately free up lots of space and you will have created one Collecting Point for you and others to use. I highly

[messages](#)

---

To discuss how McGhee strategies can help you achieve your objectives more effectively, just [email us](#) or contact us any time from our [web site](#).

recommend a paper Collecting Point at home as well as at work.

For those of you who travel, it's important to have a portable paper inbox too. On the road you collect receipts, meeting handouts, business cards etc. Collect these papers in a manila folder or a concertina folder labeled "inbox." When you get home you can empty this into the formal paper Collecting Point on your desk so that you can then process the papers. This saves using your wallet, pocket or briefcase as Collecting Points.

### **Step Three: Set up new Collecting Points**

A quick visit to an office supply store will get you a paper inbox and a portable inbox, as well as a functional notepad. It will take you just a few minutes to set up Categories (none). You can also download Microsoft OneNote and learn how to use it in only 30 minutes or so. In our next newsletter, I'll talk more about using OneNote to track reference and action information.

To summarize, do the best you can to consolidate your Collecting Points into the five or six recommended Points above. I've minimized mine to five Collecting Points: voice mail, email, paper inbox/portable paper inbox, OneNote and Categories: (none). Most of our clients have six to ten because they need to duplicate these Collecting Points at home as well as at work. Once you have set up these Collecting Points it will be a lot easier to establish what you have to do and therefore what your priorities are. Remember it doesn't take a lot of difference to make a difference.