



The 3 C's of Effective Systems

In a recent workflow coaching session with a senior executive I was reminded why most people seem to flounder with their personal systems. In spite of multiple attempted procedures for staying on top of her to-do's and paperwork (colored tabs, colored folders, red dot labels on priorities, etc.) she was still drowning and as she admitted, "ready to check into the Betty Ford Center for Out-of-Control Paper Flow"!

She lacked the **3 C's** of effective systems: **consistent**, **current**, and **context-driven**.

Consistent: She had some phone call reminders on pieces of paper, some in her head, some on post-its stuck to the phone. Keeping the same kind of reminders about the same kinds of to-do's in different media in different places is hugely inefficient and confusing. Information or reminder triggers of a specific type must be kept in the same place, the same way, all the time. Otherwise we must always be making the "what do I do with this?" decision with every such particle, and that will blow your fuses quickly. She decided to go with simple file folders labeled "Calls - Work" and "Calls - Personal", as the best way to manage those, and sanity began to prevail.

Current: No matter how consistent the system is, if it is not current (i.e. completely up to date with all items in a category) it still can't be trusted in a way that relieves the psyche of the job of remembering and sorting. You'll look at a list and some part of you knows it's not the whole list, so (a) you won't totally trust your choices and (b) you'll still try to use your head to keep track. And if your brain still has that job, instead of trusting your lists, you won't be motivated to keep your external system going (it will be too much work for the value received.) You'll feel like it's hard work to keep the list and will resist looking at it anyway because you'll know it's only partial and it will remind you that you're "behind."

Context-driven: She had been trying to organize action reminders by Project or by Topic, instead of by *where the reminder needs to be seen in order to get it done*. Project thinking and planning need to be seen by the title or topic, because that's when we need to see that information (when we're meeting or thinking about it). But reminders of the *next actions required* need to be seen where those actions can occur--phone calls when we're at a phone; errands to do when we're about to go out in our car; emails to send when we're at our computer; etc. Information and action reminders should always be stored in such a way that we are likely to see them when we need to see them, and can use or move on the data. If you store your next-action reminders by what or who they're about, every time you're in a place where you can do work (at a phone, at your desk, in your car, at home) you'd have to look through dozens of folders or files to find reminders of all your options. And when you're

running fast and only have a short window of time, you won't really check the whole inventory and you're likely to make choices from latest-and-loudest instead of objective overview.

Though my client had a new Palm PDA, given the nature of her workflow volume and style, it was not going to be nearly as effective as a simple pending file-folder system at her desk, which was easier to review and keep openly accessible when she could do the work it reminded her about. Making these changes was not a big deal for her (she had been working so hard at getting organized anyway), but getting current with consistent context-sensitive sorting propelled her light-years ahead.