

The Weekly Review Booklet by Augusto Pinaud

For many people, one of the most difficult things to understand the value of – and therefore to develop as a habit – is the Weekly Review. When I started working with GTD, I didn't fully comprehend the importance of it. But once I discovered how essential the Weekly Review is, I decided to find ways to improve my system.

After many trials (it seems I found 1,000 ways how not to do the Weekly Review), I created what I call "The Weekly Review Booklet." This booklet allows me to go through the review process page by page, keeping my focus and concentration at the same time.

The booklet also helps to remove the overwhelm factor that a lot of us feel during this time. This is how it works:

Here is a copy of the Weekly Review Template Handout that's available inside GTD Connect. I have numbered it to correspond to the steps I've outlined.

Each item on this list will have its own category and at least one page, for capturing content specific to it.

Now let's begin the Weekly Review...

Step 1: Collect Loose Papers & Materials.

I have a page with all my collection systems. It is a checklist to make sure I am not missing any collection point. (Power Tip: Process the inbox the day before your Weekly Review to jump into the fun faster!)

The Weekly Review

GET CLEAR

- 1 **Collect Loose Papers and Materials**
Gather all accumulated business cards, receipts, and miscellaneous paper-based materials into your in-basket.
- 2 **Get "IN" to Zero**
Process completely all outstanding paper materials, journal and meeting notes, voicemails, dictation, and e-mails.
- 3 **Empty Your Head**
Put in writing and process any uncaptured new projects, action items, waiting-for's, someday-maybe's, etc.

GET CURRENT

- 4 **Review Action Lists**
Mark off completed actions. Review for reminders of further action steps to record.
- 5 **Review Previous Calendar Data**
Review past calendar in detail for remaining action items, reference data, etc., and transfer into the active system.
- 6 **Review Upcoming Calendar**
Review upcoming calendar events - long and short term. Capture actions triggered.
- 7 **Review Waiting-For List**
Record appropriate actions for any needed follow-up. Check off received ones.
- 8 **Review Project (and Larger Outcome) Lists**
Evaluate status of projects, goals and outcomes, one by one, ensuring at least one current action item on each. Browse through project plans, support material & any other work-in-progress material to trigger new actions, completions, waiting-for's, etc.
- 9 **Review Any Relevant Checklists**
Use as a trigger for any new actions.

GET CREATIVE

- 10 **Review Someday/Maybe List**
Review for any projects which may now have become active, and transfer to "Projects." Delete items no longer of interest.

Be Creative & Courageous

Any new, wonderful, hare-brained, creative, thought-provoking, risk-taking ideas to add into your system???

The Weekly Review Booklet (continued)

Step 2: Get IN to zero.

David says, "Process completely all outstanding paper materials, journals and meeting notes, voicemails, dictation and emails." You already collected materials from all your sources in Step 1.

Step 3. Empty your Head.

David states, "Put in writing and process any uncaptured new projects, action items, waiting for's, someday maybe's, etc." For this step, you will want to make sure that you've placed the Incompletion Trigger List (which includes personal and professional triggers) inside your booklet. The trigger list is available inside GTD Connect.

Step 4 thru Step 8.

These steps involve interaction with your GTD System – your Action Lists, Calendar, Waiting-for List and Project List. Make sure you have a page for each step; that way you know you cannot go faster than the step you are on.

Step 9: Review Relevant Lists

In my case, there are currently 17 lists. This number varies over time.

My current lists are as follows (again, one page per list):

- Weekly Checklist
- Weekly Call List
- Work Checklist
- Cleaning Routines @ Home (5 Lists depending on the week of the month)
- Monthly Routines
- Quarterly Routines
- 20k Areas of Responsibility
- Family Roles
- Friends
- 30k 1-2 year goals

- 40k 3-5 year goals
- 50k Mission
- End of the Year Checklist

Step 10: Review Someday/Maybe

This is when the fun begins. After my entire system is in check, I now go to the last pages, the Someday/Maybe lists. At this time, there are around 20 pages for this section of the booklet. As I said before, this number will vary.

- Presents for my Wife
- Things to buy for me
- Things to buy for our home
- Games to buy
- Book lists
- Music & movies to buy
- Ideas
- Fun Stuff to Learn / Activities to Engage
- Things to fix in our cars
- Trips we want to do
- Things to research
- S/M Personal Projects
- S/M Home
- S/M Work Short Term (less than a month)
- S/M Work Long Term
- Clothes
- Fun places to go
- S/M Daughter
- Things to buy for Daughter

Going through this booklet page by page while I am doing my Weekly Review has allowed me to make sure the habit stays and I am on the top of my game.

If you have questions, please feel free to contact me in the GTD Connect Forums: apinaud.