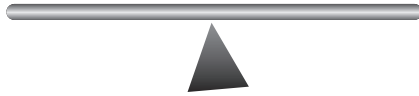


On Top Of Everything™

Manage Your Projects & Life With Ease

Projecteze®: The Ultimate Organizational System



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Introduction

*An innovation, to be effective,
has to be simple and it has to be focused.*

–Peter Drucker

Is This System For You?

I wrote this book for busy people who deal with complex and diverse projects and whose goals are to stay organized, be on top of everything, and live a balanced life with time for themselves. They already use computers, PDAs or smart phones.

Our typical clients include:

Consultants

Entrepreneurs

Professionals

Managers

Project Managers

Executives

Administrators

Executive Assistants

Students and Teachers

Many of these people use productivity tools to help them deal with high volumes of information, an increasing workload, and greater demands on their time. They have a sense that the systems they currently use are either inadequate for handling the diverse range of responsibilities they manage or are too cumbersome or complex to maintain. They often feel stressed out and overwhelmed.

How many emails do you receive in a day—10, 20, 50, 100, 200? It's not unusual for many of us to receive 50 to 100 emails in a day on top of all the meetings we have to attend, reports we have to write and projects we have to manage. And then we go home to more emails, voice mails, kids with homework and sports, and an endless list of personal responsibilities.

We are dealing with overloaded schedules, escalating demands and increasing complexity. And many of us are just barely managing to keep up because our days are so full.

Do you recognize yourself in any of these statements?

- You wish you had more time for yourself.
- You wish you had more quality time for your loved ones.
- You feel overwhelmed and burned out.
- You are always stressed from continually having to put out fires.
- Your head is filled with clutter from everything you have to remember.
- You have a difficult time relaxing and letting go.
- Your relationships at work and at home are not what they could be.

This book is about providing busy people with an effective system that will help them stay on top of everything in their lives and be more available for what is most important.

In order to benefit from this system:

- You will use a computer regularly.
- You will use a readily available software application.
- You will commit to using the system consistently.

The main challenge most people face is not in using the system, but in using the system *consistently*. The system itself is easy to master. You will need to make a concerted effort to use the system methodically—daily—for at least one month to realize its full value. Give it a month and you should expect see an improvement in your performance and how you feel about your work. From there it just keeps getting better.

A Solemn Vow and the Origins of This System

*I'm going to be like you Dad,
you know I'm going to be like you.*

—Harry Chapin, lyric from *Cats In The Cradle*

As early as I can remember, I cherished the company of my father. He was a great guy and a hero to me. And he was a hero in the truest sense of the word. As a World War II fighter-bomber pilot, he was awarded the Distinguished Flying Cross. After the war, Dad returned to North America, went back to school and started a long and successful career as an architect. As a child, I adored him and wanted to be just like him.

Starting early in his career he put in extra hours at home. He would place me in my crib on the other side of the large room where he was working at his drafting table. I learned how to get the crib to move across the floor by throwing what little weight I had into one end of it. It took me ages to get over to him, but I did—repeatedly. My reward was to be allowed to sit on his lap for a while. A few years later, I remember Dad coaching me on how to memorize the names of my model cars. Any time I could spend with him was special, and I eagerly absorbed his teachings and his presence.

As I grew older, Dad became more and more immersed in his career, and I became more aware of a consistent pattern in our lives. My Dad was less and less available for those cherished times together. After a long day at the office, he would come home and we'd have dinner together as a family; then shortly after, Dad would disappear into his home office to work. And we wouldn't see him for the rest of the evening. This quickly became the norm.

As I moved into my teens, I vowed that I would never allow myself to become so consumed by my job that I would detach from my family. This philosophy worked well until I started my own career and became a parent myself. All of a sudden, my vow wasn't so easy to keep. As I chose the roles of employee,

husband and father, life became busier and busier. And adhering to my principle of not being swallowed up by my work became more difficult. My life grew more and more complex and crowded.

As a professional engineer and project manager, I moved into a high-speed world filled with overlapping complexities and important details that would keep me awake at night. I often found project details repeating over and over again in my head. My mind raced while I tried to sleep, the details intruding into every moment.

At work, I remember feeling so overwhelmed and stressed that I would develop migraine headaches. The relentless pace and escalating sense of urgency left me feeling both mentally and physically exhausted. I felt completely disconnected from any sense of peace, and I knew from experience that the relationships that mattered the most to me were suffering. Before long, I could see I was living a life that was not unlike my father's. I knew I had to break the pattern. Surely it was possible to stay in my chosen profession without having to endure the perpetual stress, feelings of being overwhelmed, and continual sacrifices that characterized my normal state of being.

Knowing I was ultimately responsible for my own situation, the solution laid in the way I responded to things and the way I organized my life. I knew I needed to live my life differently. Convinced that there must be an alternative—I started to appreciate the difference between *having a full life* and *living a fulfilling life*. I became very motivated to change.

Searching For A Solution

Early on, as I searched for a solution, I learned an important lesson: when I was well organized, I was better able to be proactive, relax more easily and enjoy greater freedom. I found that being organized created space and “freed up time” which took a bit of the pressure off. Periodically, I could pull my head out of the details, enjoy life, and more fully appreciate the people and things around me. When I was well organized, life didn’t always seem like a mad rush. The problem was, despite my efforts, I could never stay fully organized.

In my pursuit of finding the perfect organizational solution, I used many different personal productivity tools to improve my effectiveness. I used paper-based systems such as Day-Timer® and TimeText® to some benefit. Computers brought about new possibilities, but many computer-based and hand-held systems, despite all their promises, were rigid in their structure and lacked the flexibility to deal with diverse and complex information from within their standard productivity tool kits.

Throughout my career, I have used more robust and complicated project management tools. I tried to adapt these to meet my organizational needs, but I realized very quickly that project management systems were overly complex for my purposes. They lacked the ability to simply and easily help me manage my team and myself during a project, especially when I was working on several different projects at a time for many different clients.

Finding a workable solution turned out to be a bigger challenge than I had anticipated. After years of frustrating trial and error with personal productivity and project management tools, I decided to develop my own solution.

Developing the Ultimate Solution

*In order to go from brilliance to wisdom,
you have to pass through simple.*

—Marilyn Ferguson

I wanted to be “On Top of Everything” task-wise but not just for the sake of being hyper-organized. Being hyper-organized was worthless if I achieved success by being more efficient at the cost of my relationships and especially my home life. I wanted to carve out some space for myself—for family and personal time. I wanted to succeed at my career without being swallowed up by it. I wanted to be available for what was most important in my life.

It occurred to me that I needed a third option, “a hybrid tool”, a blended productivity and project management tool that was simple yet sophisticated enough to help me manage myself within a multi-client, multi-project environment. It had to help me see the forest *and* the trees.

Despite a relentless search, I could not find a system that provided the mix of features I was looking for. I needed a practical system that was:

- 1) Simple—so it wouldn’t be a chore to set up and use.
- 2) Flexible—to deal with roles and accountabilities across many projects and many clients.
- 3) Adaptable—able to store relevant information, no matter how detailed, for how ever many projects I threw at it.

I ended up creating my own highly effective solution—a method I call *Projecteze*®: *The Ultimate Organizational System*.

Ten Years Later

Fast-forward ten years. Now I can't imagine working the way I used to. As a professional engineer and project manager, I have worked on many projects with significant budgets in a variety of environments. Using the Projecteize system, I have been able to deal with more diversity and complexity than I would have thought possible when I began my engineering career. What is equally rewarding is that I have a rich and fulfilling life with wonderful relationships both at work and at home. I am an active parent and I have time for hobbies, sports and personal pursuits. With Projecteize, I realized the objective I set for myself as a teenager.

My three secret weapons have been the Projecteize system, my own diligence in using it to stay on top of everything, and my choice to be more available for life.

This book will share the actual mechanics of the Projecteize system—which won't take long to learn because the system is incredibly simple. The majority of the book focuses on helping you understand how to apply the system and customize it to suit your own needs.

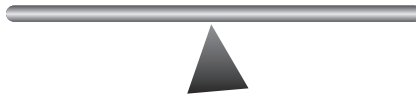
My goal is for Projecteize to help you achieve the success you want without sacrificing your life in the process. I want you to be “On Top of Everything” and available for the things in life that really matter to you.



**Projecteze:
The Ultimate Organizational System**

*Furious activity does not necessarily equate to progress
and is no substitute for understanding.*

—Anonymous



The Evolution Of Information Overload

Not so many generations ago, life was simpler. It used to be that a person's workload might have amounted to a handful of things to accomplish in a day. The daily pace was much slower then, and there were only a few core tasks to focus on, usually one at a time—feeding the chickens, milking the cows, plowing the fields, and watching the sun go down. Compared to today, there was a lot less that required our urgent attention.

It is hard to believe how much life has changed just since the invention of the computer. The first personal computers came out in the late 1970s and early 1980s and the nature of work became more complex. With this new technology, people were not only able to save their work in progress, but they could manipulate ideas and data more easily and with greater efficiency than ever before. This was a revolutionary change that altered expectations of how fast we could respond to requests and what we could accomplish in a day.

The fax machine became commercially available and widely used only as recently as the late 1980s. Written and visual communication could be shared with anyone around the world in minutes. With this enhanced connectivity, our lives sped up another notch and the timeframe for exchanging information advanced from days to mere hours. Since then, email has compressed interaction times to minutes—even seconds. Today, instant text messaging says it all. Talk about life speeding up!

The evolution of information technology brought with it the expectation of immediate interaction with and response from other people. This phenomenon resulted in greater productivity, but the pace of the average workday also increased and became more stressful. Information overload became the norm rather than the exception as expectations accelerated with every new advance in data processing and communications. Comparatively, we can only look back enviously at past generations and their relationship with time.

Life may have improved in many ways, but now one of our key challenges is to figure out how to cope with the relentless barrage of information and a steady increase in the complexity of daily life. Today we typically have hundreds of items to process in a day. We feel a continual pressure to coordinate with dozens of people, prioritize, delegate, keep our focus on several often-conflicting objectives—and still see the big picture. Most of us have simply become busier and busier, and as a result, we sacrifice precious time that could be devoted to our relationships and to ourselves. Many find it more and more difficult to maintain any sense of balance.

Without balance, all of this “busy-ness” can lead to elevated stress levels. Working harder, longer and smarter as a means to cope only works for a while. As soon as we learn how to handle one level of overload and free up some space in our calendar, we just fill it with more work as we strive to somehow handle an even greater degree of complexity and volume.

This spiral of more and faster leads to either hyper-efficiency or burnout. More than likely, at some point our support systems break down and we get stressed out, burned out—or worse. What can we do to take charge of this ever-accelerating cycle?

What do the best of the best do?

All project managers face problems on Monday mornings—good project managers are working on next Monday’s problems.
—Anonymous

In any profession, there are always a few who excel beyond the norm. This is true in project management as well. So, what separates the best project managers from the rest? In his book *Alpha Project Managers: What the Top 2% Know That Everyone Else Does Not*, Andy Crowe describes his findings from an extensive survey of project managers. Based on meeting certain criteria, including scores on key performance indicators, the top 2% who excelled above others in their profession were designated as “Alpha Project Managers”.

Crowe's key findings include:

- 1) Nearly all of the Alphas demonstrated two key abilities associated with having a system to help them prioritize work and maintain focus on a project's critical success factors.
 - The first was the ability to sift through massive amounts of information, extract only the most important components, and sort the information appropriately. (2006:70)
 - The second was “the ability to establish and maintain priorities on both a higher, strategic level and a lower, tactical level.” (2006:70) A vast majority of the Alpha group were dedicated to the discipline of regularly reviewing their priorities.
- 2) A universal theme among the Alphas is that they have solid relational skills. “Many revealed in post-survey interviews that their success at managing projects was proportional to the strength of their relationships.” (2006:185)

A key point to take from Crowe's work is the importance of having the discipline to use a system on a regular basis to set and maintain priorities, handle information overload, plan ahead, support relationship building, and maintain a sense of balance.

Existing Productivity Systems and Unworkable Gaps

*My mechanic told me, “I couldn't repair your brakes,
so I made your horn louder.”*

—Steven Wright

Over the past 30 years, I have used many personal productivity and project management systems and tools. Each one carried some merit, but I never found a system that provided me with everything I was looking for. There was always something missing, an unworkable gap to contend with.

There were the hand-written systems such as Day-Timer™ and Time Text™. Many of these paper-based systems featured variations on a consistent theme: managing a workload from a list of daily *To Dos*. Each day I would complete what I could and any remaining items had to be hand-written onto the next day's page. If these were low-priority tasks, this process could go on for days or even weeks. I got sick and tired of re-writing these tasks, continually having to bring them forward and, as I did this each day, having them remind me of where I had failed to complete an objective. This process frequently left me feeling that I'd dropped the ball, even though these tasks had to be left undone in order to attend to much higher priorities. If I wanted to stop carrying those lower priority tasks forward, it meant I would have to transfer them to some other list or lose them altogether.

Then there were systems that advocated maintaining separate lists—perhaps one for each project or objective. This complicated matters and multiplied the time required to stay organized across a group of projects.

Other systems proposed using a physical bring-forward file where you had to transfer items from one physical file to another physical file. This resulted in increased paper filing and moved me away from the ideal efficiency of handling documents only once.

PDA's and smart phones upgraded the *To Do List* concept by making it digital. Using these systems, I no longer needed to manually bring tasks forward, but they tended to be overly simplistic in terms of their ability to group tasks by project and by client. Descriptions had to be kept very brief and the information could only be viewed in limited ways (often only by priority or by date). The *To Do List* approach was largely insufficient for handling the complexity of what I had to deal with each day. Benefits from electronic *To Do* lists were also often offset by an increase in information overload because I had to learn a new device and its accompanying software. Perhaps the most troublesome aspect of these electronic *To Do* lists was the complicated and error-prone process of synchronizing my mobile device with both my work and home computers.

Microsoft Outlook is a great example of a basic task management *To Do List* and calendar system. Outlook offers a fine interface for basic organization and group collaboration, but as soon as I tried to use it for multi-project or multi-client situations, its usefulness plummeted. It simply could not handle the complexity effectively.

We often associate organizing vast amounts of information with spreadsheets; however, for me there were some less than appealing aspects associated with using them for tracking and managing project information. Spreadsheets have limited formatting options and limit the number of characters that can be presented in each cell. If the number of characters is extensive, they will often be truncated on the screen and on the printed copy. This restricts the amount of information that can be effectively used in any one cell.

Microsoft Project and Primavera® are common examples of project scheduling software. They work very well for the comprehensive scheduling of a project. The overwhelming challenge with this kind of software is that these are not simple programs; there is a steep and lengthy learning curve associated with them. They serve their purpose of scheduling and tracking projects very well, but for my purposes, I primarily wanted to focus on how to effectively manage myself and the responsibilities assigned to team members. That is an entirely different focus.

Another organizational alternative is on-line collaboration systems. Collaborative solutions expose one's own performance to the degree of involvement by other team members. If others don't provide accurate or timely input, the effectiveness of the tool as a whole decreases to the point that it won't maintain credibility with the team, and its use progressively diminishes. My problem with these systems was that they could not be tailored to deal with and monitor my own objectives. First and foremost, I needed to be able to manage myself and my responsibilities for the projects I was working on.

When I realized that none of the systems I tried could provide me with what I wanted, I tried to combine systems. I thought that maybe if I combined individual systems, I could make the combination work for me. The resulting process was overly complex and unmanageable. It always involved a complicated coordination of separate documents and systems that took too much time and effort to manage.

Over the past three decades there have been numerous personal and project management systems that have come onto the market. You name it, I've tried it. After an exhaustive search, I was never able to find any one system that worked the way I needed it to.

Current personal productivity systems, be they paper-based or computerized (Microsoft Outlook, PDAs and smart phones), failed me on four fronts:

- 1) They were operationally too complicated to coordinate work between office, mobile, and home—especially when this involved more than one computer platform (i.e. Mac® vs. PC).
- 2) They were financially expensive, but, even more importantly, they were expensive in terms of the extensive time and work investment required to realize any value from them.
- 3) They were too unsophisticated or inflexible or restrictive in terms of their ability to work with complex project information (client, project, task, priority, delegation and accountability).
- 4) They were limited in their ability to format and present information in a user-friendly manner.

In general, I found most personal and project management systems were either too simplistic, too complex, too demanding or too structurally rigid.

I needed to find a better solution.

Hyper-Efficient and Balanced

*I put instant coffee in a microwave oven
and almost went back in time.*

–Steven Wright

There is an inherent challenge built into personal productivity objectives: I can eventually become hyper-efficient if I really work at it. I can always be more efficient. I can always get better at handling large volumes of information and managing the increasing complexity of completing tasks and delegating work. The problem with striving to become hyper-efficient is that it can be a trap. It never ends. There is no point of arrival. The pace, volume, and scope can just go on expanding—more and more, faster and faster until you or your system reach a limit and break down.

Any motivation I have for being increasingly efficient must include some aspect of personal purpose. It needs to include a personal goal such as: “I will be hyper-efficient in order to have more quality time for my family and myself.” This is a very real and tangible reward that motivates me. In fact, it describes the lifestyle balance I have strived for since my teenage years.

Working in an accelerating environment for more than 30 years, I have witnessed and experienced first-hand the stress associated with the escalating cycle of more efficiency, which begets more responsibility, which in turn demands more efficiency, which then begets even more responsibility—etcetera, etcetera.

Dealing with the need for hyper-efficiency presents two core challenges:

- 1) What will enable me to effectively handle an escalating volume and complexity of information?
- 2) What will help me avoid the trap of simply filling space I create with more work?

Creating Space

The human brain can only hold about seven pieces of information for less than 30 seconds!...

If you want to extend the 30 seconds to a few minutes or even an hour or two, you will need to consistently re-expose yourself to the information.

—John Medina

How do we balance the equation?

Hundreds of authors have written articles and books on how to improve personal effectiveness. A common theme has been the need to create space in our lives so that occasionally we can step back to see the big picture, and in turn, make better choices about what is important versus what is simply urgent. Our relationships very often depend on this.

In his book, *First Things First*, Stephen Covey describes how we tend to get pulled into work that is “urgent and important,” dousing fires that need to be put out immediately, and in the process all too often letting others set our own priorities. This all happens at the expense of not being able to get at work that is “important, but *not* urgent” which includes planning, preparation, prevention, and extremely important relationship activities such as team building, networking and just taking the time to give our complete attention to another person in conversation. The urgent tasks crowd out the equally important non-urgent tasks, forcing us to catch-up during extra hours. (1994:37-41)

In *Getting Things Done*, author David Allen advocates having some mechanism for downloading everything that is on your mind so you can be freer to react more fully to the moment. He recognizes the advantages of downloading mental clutter and freeing yourself for more important big-picture work. Beyond downloading the mental clutter, Allen also observes:

The ability to be successful, relaxed, and in control during these fertile but turbulent times demands new ways of thinking and working.

...There has been a missing piece in our new culture of knowledge work: a system with a coherent set of behaviors and tools that functions effectively at the level at which work really happens. It must incorporate the results of big-picture thinking as well as the smallest of open details. It must manage multiple tiers of priorities. It must maintain control over hundreds of new daily inputs.

You need a good system that can keep track of as many of (the things you have to think about and deal with in one day) as possible, supply required information about them on demand, and allow your focus to shift from one thing to the next quickly and easily. (2001:7, 9, 21)

Covey and Allen both describe why we need a system that can help us download our mental clutter and step back from the urgent issues in our life so we can create space with which to take on the important non-urgent work associated with seeing the big picture and strengthening our relationships.

My Personal Organizational System

I didn't want a system that would help me become hyper-efficient for the sake of being hyper-efficient. Instead I wanted something that would help me strike a better balance between being efficient and being available for life. I reasoned that with a balance that included being more personally available, I would be able to see the big picture more clearly—and that would help me make better choices in *all* areas of my life.

Relating back to my exhaustive search, my goal was to find an organizational system that would help me clear the mental clutter that infringed on my work and home life. It would be able to handle overwhelming volumes of complex information and the dimensions of client, project, task, priority, accountability and delegation. This system would help me stay on top of commitments, both my own and other people's commitments to me. A primary driver for using such a system would be to create space for what is most important: seeing the big picture and being more available for life—for my work, my relationships, and myself.

Requirements For The Ultimate Organizational System

In order to realize the objectives I had identified, my ultimate organizational system would have to satisfy specific requirements. A workable solution would have to:

- Be computer-based.
- Be able to handle everything in one place—i.e. as a single source.
- Be simple to learn and easy to use.
- Have a low financial cost and minimal time requirement to learn and use.
- Have no requirement to buy and learn a new gadget or software.
- Be a cross-platform solution, compatible with PC, Mac®, mobile and on-line.
- Be able to collect, assess and process information for multiple clients and projects.
- Be able to handle a diverse range of information and detail at the task level.
- Be able to present the big picture view.
- Make it easy to enter and manipulate information—group, sort and prioritize.
- Be flexible for entering, formatting and presenting information.
- Provide me with only the information I need, when I need it.
- Make me aware of the highest priorities I should be paying attention to at any time.
- Enable me to stay on top of commitments for myself and others involved on my projects.