$$1 + 1 = [\,[\,(9 \times 3)/3\,]/3\,] - 1$$

You'll notice that the formula balances, but that the right side of the equation adds a lot of steps and unnecessary complexity. It's there to remind me that the simplest approach is always the best place to start, and it's the first thing I see when I arrive at work each day.

Unnecessary complexity is an unfortunate, but natural, result of organizational growth. Things are very simple in the early stages of a business. There are few people involved, and everyone has to be a generalist. It's very entrepreneurial, and everyone is very close to the "main thing" for the company. It's easy to see how individual efforts contribute to the overall objectives of the company. It may be challenging to keep up, but the rules are pretty simple: Do your job, whatever it takes.

As the company grows, however, there is more and more demand for specialization. Divisions are created and silos are established to manage different areas of business. Each division has its main thing, which is a subset of the overall main thing. People are hired within these divisions, and they also have their individual objectives and responsibilities. Systems are established, goals and quotas are implemented, and workers dive deeply into their highly specialized work. Some of these workers are now three, or four, or five steps away from the central objectives of the company. There are objectives upon objectives, and systems upon systems. It can get very complex. It becomes easy to grow confused about how we should prioritize our work and even what we're really trying to do when we have to navigate a matrix of priorities just to develop a simple task list.

gives me a cliff-top perch from which to view my upcoming week and plot my course. Others I've worked with prefer to wait until first thing on Monday morning, or even to do this checkpoint over the weekend. If you have an organizational system that you're already comfortable with, you can also find ways of working your weekly checkpoint into your existing systems. For example, I've used David Allen's *Getting Things Done* methodology for years, and I like to lump my weekly checkpoint in with the weekly review suggested by David's system. Whatever works for you is fine, but be consistent.

During your Weekly Checkpoint you will think about how to implement the practices into your upcoming week. Here is a complete list of the practices we discussed in the book:

> **Focus:** Challenges, the Big 3, Clustering
> **Relationships:** Circles, Head-to-Heads, Core Team
> **Energy:** Whole-Life Planning, Pruning
> **Stimuli:** Study Plan, Notation, Purposeful Experience
> **Hours:** Idea Time, Unnecessary Creating

Block off twenty minutes on your schedule for the Checkpoint, then work through each of the practices and where appropriate schedule them in your calendar.

WEEKLY CHECKPOINT PROMPTS

> **Focus**
>
> *Challenges:* Look at, or create, a comprehensive list of your projects. Do each of them have associated Challenges? If not, create them.
>
> *Big 3:* What are your Big 3 for the week? Write Challenges for each of the Big 3.
>
> *continued*

Clustering: Are there ways you can structure similar work this week so that there is less task switching? Block specific time on your calendar for these activities.

Relationships

Circles: Do you have a circle meeting on the calendar? Do you need to prepare for it? If so, put time on your calendar.

Head-to-Heads: Do you have any head-to-heads this week? Do you need to prepare? When will you do it? Put time on your calendar.

Core Team: Do you need to reach out to a member of your core team for advice on something? If so, add it to your task list for the week or fire off a quick e-mail.

Energy

Whole-Life Planning: Are there any potential conflicts this week between work and personal activities or expectations? How will you get ahead of them?

Pruning: Is there anything that you'd planned but now realize may not be a good idea, given your upcoming schedule? How can you prune it? Additionally, are there any "hard runs" in which you'll have all-day or back-to-back meetings? How will you plan something energizing around or between them to prevent burnout and stay energized?

Stimuli

Study: When will your personal study times be this week? Put them on the calendar. What will they consist of? Take a look at your Stimulus Queue and map your week's stimuli.

Notation: Take just a few minutes to glance at your notes from the previous week as well as the indexes in the front of your notebook.

> *Purposeful Experience:* Do you have one on your calendar this week? When will it happen?
>
> **Hours**
>
> *Idea Time:* When will you structure your Idea Time this week? What will you focus on during these sessions? Put it on the calendar with the associated project name.
>
> *Unnecessary Creating:* What will you do for Unnecessary Creating this week? Put it on your calendar.

On page 188 is an example of what your week could look like after the Weekly Checkpoint.

You'll notice that all the practices are represented in this calendar, which will not always be the case. Each week will look different, but being purposeful about putting the practices onto your schedule before your time fills up will help you ensure that they don't get squeezed out. Additionally, you'll notice that the evenings are free and clear because this schedule demands getting out of bed early. Your schedule may be weighted more toward the evening if you tend to prefer being active then.

Also, depending on your preferences, you may want to combine exercise with your study time a few times per week by listening to audio books on the treadmill or while doing resistance training, or by going for a run while listening to a podcast or two. It doesn't really matter when the practices happen, as long as they are present.

Be sure to allow some space in your calendar to breathe. Don't be so rigid that you account for all your time, as unexpected interruptions are likely to interfere with your plans and frustrate your efforts. If you are coming into an especially busy season, you may need to ebb and flow with it, which is fine.

WEEKLY CHECKPOINT

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
6:00 a.m.		**Study (:60)** *The Accidental Creative ch.4–5*	**Exercise/Study (:60)** *Listen to 2 podcasts*		**Study (:60)** *Read Trend Report*		
7:00 a.m.				Dentist (:90)		Exercise (:90)	
8:00 a.m.	**Review notes (:15)**	**Review notes (:15)**	**Review notes (:15)**		**Review notes (:15)**		
9:00 a.m.	Planning MTG (:90)	Conf. Call (:90)		**Review notes (:15)**		Take kids to park (2:00)	
10:00 a.m.			Team Meeting (:60)				
11:00 a.m.	**Process e-mail (:30)**						
12:00 p.m.	**CLUSTER/working lunch (:60)** *invoicing*	Client Lunch (:90)	**Lunch w/Joe for head-to-head (:60)**	**Lunch/Study (:60)** *watch 2 TED Talks*	**Lunch + call w/Jim from Core Team (:60)**		**Purposeful Experience (:90)** *Go to museum*
1:00 p.m.				Production Review (:90)	Client Review (2:00)	Clean garage (:90)	
2:00 p.m.	**Idea Time (:60)** *XYZ Project*						
3:00 p.m.						**Unnecessary Creating (:60)** *Novel story line*	
4:00 p.m.	**Process e-mail (:30)**	**Process e-mail (:30)**	**Process e-mail (:30)**	**Process e-mail (:30)**	**Weekly Checkpoint (:30)** **Process e-mail (:30)**		
5:00 p.m.	**Buffer (:30)** *bookstore*						
6:00 p.m.	Family Dinner	Family Dinner	Family Dinner	Family Dinner		Family Dinner	Family Dinner
7:00 p.m.					Dinner w/Russels		
8:00 p.m.		**Take a walk (:30)**		**Circle Meeting (:60)**			
9:00 p.m.							

MONTHLY CHECKPOINT

The one constant in the life of a creative is change, which means that you must regularly ensure that the plans you've made and the practices you've established are still relevant. The Monthly Checkpoint is about reviewing how the past month went, and recommitting to, or changing rails, around practices for the upcoming month. It's a way to gain a more clear perspective on your current priorities and workload.

The Monthly Checkpoint is an hour per month, preferably at the very end of a month (to plan for the upcoming one). The goal is to recognize trends in your work and to do some strategic thinking about which types of practices will help you most in the coming weeks.

MONTHLY CHECKPOINT PROMPTS

Focus

Challenges: What are the biggest projects you'll be working on in the coming month? Do each of them have Challenges? If not, create them.

Big 3: What are your Big 3 for the month? Write Challenges for each of the Big 3 if they don't already exist.

Clustering: As you examine the upcoming month, are there days or weeks where you can cluster project work in order to focus more deeply? If so, plan ahead by marking those days on your calendar.

Relationships

Circles: When will your circle meet this month? Put time on your calendar or send invites to members.

Head-to-Heads: Do you have any head-to-heads this month? Put them on the calendar or send an invite to the other participants.

Core Team: Do you have any Checkpoints coming up with your core team members? You may want to schedule a lunch or a call. Send an invite or an e-mail.

Energy

Whole-Life Planning: As you survey the landscape of the upcoming month, are there any potential conflicts this week between work and personal activities or expectations? How will you get ahead of them?

Pruning: Look at your upcoming month; are there any especially busy weeks where you may need to prune either work or personal commitments in order to maintain a healthier energy level? Do it now, before things get too busy.

Stimuli

Study: Which items from your Stimulus Queue will you incorporate into your study times this month? Determine now what will best help you with your upcoming work and schedule. You may even want to create a note in your calendar on a weekly basis with the stimuli you hope to use that week.

Notation: Take a few minutes to review your idea index. Is there anything that may apply to upcoming projects? Is there anything that needs to be turned into a project? This is the time to do it.

Purposeful Experience: What kinds of experiences would you like to schedule into the upcoming month? What experiences would help you with your work? Create a list to use in your Weekly Checkpoints, or go ahead and put them on your calendar now.

Hours

Idea Time: Given the nature of your upcoming work, would your Idea Times be best placed at the beginning or end of your weeks? Which projects will definitely need some focused Idea Time? Make this list now to use in your Weekly Checkpoint.

Unnecessary Creating: What kinds of Unnecessary Creating projects will you work on this month? Take a look at your Project Queue and select the projects that seem the most appropriate given the time and energy you'll have this month. Add them to your calendar, or just make a list for use in your Weekly Checkpoint.

Additional Questions

In addition to the more practical questions about the practices, the Monthly Checkpoint is a good opportunity to ask some self-probing questions about your current work. While some of these questions may seem obvious or unnecessary, the answers can often be surprising.

How do you feel about the work you're doing right now? Do you feel like you're doing your best work? Why or why not?

What do you perceive to be lacking in your life and work right now? What can you do about it?

QUARTERLY CHECKPOINT

People are brilliant at developing permanent solutions to temporary problems. Though you may not often recognize it, you probably see this all the time in your organization. This is why we often see big, cumbersome bureaucracies within companies. Many of those bureaucratic systems were developed to deal with pressing problems at some point in the past and have now become

energy-zapping dinosaurs. It also happens in our personal life. We develop habits to resolve problems, such as e-mail inundation, lack of energy, or a desire for relational connection, but then these habits live on once our needs have been met. The Checkpoints ensure that these personal bureaucracies don't take over your life and kill your best work.

Any of your practices can become more harmful than helpful if you don't adjust or prune them from season to season. This is the primary reason for the Quarterly Checkpoint. It is a check-in to help you evaluate how things are going and to establish the practices you think you will need in the next quarter in order to meet the demands of your life. It's like climbing a really tall tree to get your bearing and take a look at the upcoming terrain. It may seem like a temporary diversion, but this can make you much more effective as you continue your journey.

The Quarterly Checkpoint is the longest horizon planning you will do. While many productivity experts recommend annual retreats to examine goals and objectives, I find that these are often too long term to provide an accurate analysis of upcoming work. Ideally you will be able to take an entire day for this quarterly session, but, understandably, you may not be able to break away from your life in order to do so. If this is the case, the Quarterly Checkpoint can take place an hour at a time in the mornings or evenings over the course of a week.

One member of our coaching community shared how these Quarterly Checkpoints have been invaluable to her. She says, "They help to create balance in my life. I go to the library for about four hours on a Sunday afternoon armed with my daily notes and journal entries from the past quarter and my calendar for the upcoming quarter. I then analyze the past and plan for the future. It has been interesting stepping back from my own life and looking at it as an outsider. I look at where my energy has been going and where I want it to be going. I come away from the retreat with my Big 3 for the next quarter. The Big 3 go on my

daily log that I use at my day job so I know what I'm really trying to do in life."

There are two main priorities for the Quarterly Checkpoint: establish your focus for the upcoming three months and set general rails around your practices.

QUARTERLY CHECKPOINT PROMPTS

Focus

Establish areas of focus. Divide a sheet of paper in two and on one side write "work" and on the other write "personal." Spend twenty to thirty minutes thinking of all of the commitments you will be accountable for. You want to be as comprehensive as possible because this will provide the working template for how you structure other elements of your plan.

A commitment is anything that you will be accountable for delivering. This can mean a large work initiative that will require a lot of creative effort, or it can mean a small personal project you're personally committing to get moving on. This is not a wish list of things you'd like to do someday; it's a list of things you are actually committing to doing or are accountable for doing in your work. If it's on the sheet, it's something you're planning to get done in the next three months (or planning to spend a significant amount of time working on).

What are the Big 3 for the quarter? These are the big conceptual hurdles you will need to jump this quarter in order to succeed in your work.

Establish Challenges for each of the Big 3. These should be phrased in the form of a question, and they should capture the

continued

main creative problem you need to solve. For each commitment you've listed, you should be able to answer the question "What am I *really* trying to do?"

Relationships

Once you have a sense of direction for the upcoming quarter and for the scope of your commitments, you can begin setting some rails for the other practices. Your relational rhythms are best examined on a quarterly basis to make sure that you are filling your schedule with stimulating interactions but not becoming overwhelmed with obligatory ones. Doing this will also help you determine where there are gaps in your existing relationships that you may want to fill in the upcoming season.

Who are the people you will be setting head-to-heads with this quarter? Have you thought through how this will happen? What is the best timing for your meetings? What kinds of things will you discuss? Take the opportunity afforded by your Quarterly Checkpoint to do an audit of all your relationships and to set new expectations around them. Perhaps you have standing meetings that need to be reevaluated. Maybe there's an old friend or colleague whom you'd like to spend more time with. Maybe there are some relationships that need to be put on temporary hold in order to account for the rhythms of the upcoming season. You have total permission to evaluate all your relationships with a clean conscience, then to make decisions strategically.

To some this may sound a little harsh. After all, how can we treat our relationships as a matter of convenience and discard them when they become cumbersome? To be clear: that's not at all what we're talking about. In fact, this is actually about making the relationships we choose to maintain more productive and meaningful. When we are selective about how and where

we spend our relational energy, we find that our connections deepen and that we're actually able to give more of ourselves to the people in our life. It's when we're not selective that we end up living on the margin and giving leftovers to others.

Will you be meeting with a circle? If so, what will that rhythm look like for the upcoming quarter?

Think about your core team. When will you meet with them? You need to give these people enough notice so that they are able to give you their full attention when you meet.

Whom are you going to purposefully spend more time with this quarter? Are there people with whom you would like to spend more quality time in order to develop your relationships and possibly to gain mental traction on your work?

Energy

After you've listed each of your commitments for the upcoming quarter, you will begin to gain a sense of what you're expecting of yourself, or others are expecting of you, in the next few months. If you've never performed this exercise before, seeing the entire scope of your work laid out before you can be an eye-opening experience. It may even be a little overwhelming to see all your work and personal creative aspirations listed side by side. Not to worry—that's precisely the reason we're doing this exercise. A little discomfort now will save you a ton of stress down the road.

Each of these commitments represents not only time and creative work that you'll be accountable for but also energy that you'll be required to expend. As we discussed earlier, sometimes projects—even very good ones—can steal needed energy from more critical, productive projects. Many people don't realize the cumulative effect of their choices on their

continued

workflow. Ongoing, recurring creative commitments are often the result of a decision made once upon a time that continues to require energy and focus many months, even years, later. As these commitments begin to show up on your list, you see the true effect of choices you've made and how they may still be limiting your ability to engage with more pressing work.

Are there any projects that need to be pruned? Of all of the things on your list, is there anything that needs to go away this quarter so that you can focus your efforts on more productive work?

Is there anything else coming up this quarter that is abnormal but that needs to be considered? Are you taking vacation, or are there any other trips on the calendar? You need to take these into account, because they will affect your workflow and your energy. Often we don't look at how things like trips, time off, or family commitments will affect our ability to engage, and as much as possible, it's best not to plan our critical work around times when it will be difficult to mentally engage, like the last few days before a critical trip or the first few days back.

Remember that the purpose of looking at the scope of your commitments through the lens of Energy is to identify any easy decisions about what needs to be scaled back or where you may have unwittingly made long-term commitments that are becoming unwieldy.

Stimuli

What kinds of stimuli will help you with the projects you'll be working on? Can you identify any knowledge gaps in the commitments on your list? Are there any projects that will require special information? Now is the time to identify

those needs and to list a few resources that may be able to help.

What are you curious about right now? List a few subjects that you're curious about or that you'd like to explore. If you can, list a few resources that are interesting to you and that you'd like to add to your Stimulus Queue.

How will you challenge yourself to grow? List a few items that you are going to study or experience this quarter as a way to grow your mind and stretch your experience base. These can be books, places you'll visit, meetings you'll attend, or anything else that causes you to see the world in a new way. The important thing is that you're listing concrete items and at least tacitly making a commitment to them.

Hours

Which of the projects on your list will require the most creative thought time? Can you identify four or five projects that will require an extra amount of creative effort? Not that you are going to do anything about it at this point, but it's good to begin identifying them now, in advance, so that you can earmark Idea Time against them.

What will your Unnecessary Creating projects be? Some of these may be listed already on your commitments list, but spend some time thinking about the kinds of projects you would like to initiate or continue this quarter. These items will be added to your Project Queue, and you will work on them during your Unnecessary Creating time. Again, it's not critical to get these exactly right. The whole purpose is simply to do an analysis of the kinds of things you're currently interested in working on and to make a commitment to trying new things and creating unnecessarily this quarter.