De-stressing through Organization and Delegation

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Dartmouth Medical School
Mental stress caused by multiple projects/demands

Limited time

Constant mental juggling and searching of projects, tasks, deadlines, ‘WHIFs’

Loss of sleep
Brain volvulus
Limit your input
Organize your output

To reduce brain
popcorn
Brain dump all tasks/projects into an external system
Rely on this system to track what, where, when
Your mind is for having ideas not holding them
Dealing with ‘to do’ lists
Project and task organizational strategies
Organizational tools
Email overload
Procrastination
Delegation
Getting Things Done
The Art of Stress-Free Productivity
David Allen

Inbox Zero
action-based email

Merlin Mann
Google Tech Talk

What's Here
What's Inbox Zero?
Original Inbox Zero Articles (2006)
Original Inbox Zero Video (2007)

Elsewhere
MerlinMann.com
43 Folders
Back to Work

www.inboxzero.com
1. Collection
   Collect all ‘stuff’ into as few places as possible

2. Process
   Decide what needs to be done with each item of ‘stuff’

3. Organize
   Projects and tasks, resources, files

4. Review
   Review your projects and actions regularly

5. Do
Limiting input

✓ Say NO more often
  "Vitamin N"

✓ Only say YES to projects that interest you (or further career!)

✓ Reduce meetings

✓ Reduce Email

✓ Reduce paper mail

✓ Reduce social networking
To do list

1. Write talk for ANR
2. Edit 500 questions for REW
3. Write 50q for NBME
4. Put recycling out
5. Call plumber
6. Contact AMSTK regression
7. Write OUP chapter
Problems with to do lists

- Contain mixtures of projects and tasks
- Usually do not identify what actually has to be done
- Do not sort by WHERE or WHEN or PRIORITY
- Hang around for a long time
A task is a single definable action.

Project is a collection of >1 action that leads to a common goal.

Contexts may be places, times, available tools or mental states to complete tasks.
Projects

- Write a paper
- Make a talk
- Write 50Q for NBME
- Organize a program
- Paint a room
- Find a new school
- Do the xmas shopping
- Clear out my house
Tasks

- Look up references
- Download case of bowel volvulus
- Email Dr. X to ask if he will participate
- Buy paint
- Phone Oakley School and arrange visit
- Order Lionel’s new rugby shirt online
- Turn out kitchen drawers
Email
Phone
In town
In office
At home
While travelling
Thinking time
Brain dead
Delegated
5 min task
For any project you can identify

- **What** you specifically need to do (each action)
- **When** do you need to do it by
- **How** or **where** you are going to do it
Contexts help:

More efficient to do all emailing/phonning at once

Know what needs to be achieved at a certain location
  e.g. in office, in town

Know what can be achieved in a certain time frame
  e.g. 5 min tasks

Know what can be achieved in a certain mind state
  e.g. mindless, thinking time
Prioritizing

By date due, ‘importance’, interest, mind state
1. Identify ALL projects (work, home)
2. Identify the series of actions (tasks) to complete them
3. Which is the NEXT ACTION needed to progress in each project?
4. What is the context(s) needed to complete this task?

5. When does it need to be done?
Most people have 30-50 projects ongoing
Each has several ‘actions’
I have 150-200 ‘actions’

Much less daunting when broken into small steps

Identifying all projects, timelines and steps
Reduces mental stress
Reduces concerns about deadlines, WHIFs
Need means of collecting ideas, projects and tasks as soon as you have them

Need means of sorting and categorizing

Paper
Computer
Web
Ipad/tablet
Smartphone
Reviews

http://www.priacta.com/Articles/Comparison_of_GTD_Software.php

Smartphone/ipad and web

www.nozbe.com
www.rememberthemilk
www.toodledo.com

iPhone/ipad

2DO

Action lists

Desktop

www.taskangel.com
I use a folder for each project.

Add notes or incorporate automatically from email.

You can decide how many of these criteria you want to record and see.
### Toodledo Tasks

#### New Search

- **DO TODAY**
- **HOT LIST**

#### Search Criteria

- **Context**
- **Priority**
- **Folder**
- **Start Date**
- **Due Date**
- **Length**
- **Tag**

#### Task Details

<table>
<thead>
<tr>
<th>Task</th>
<th>Context</th>
<th>Priority</th>
<th>Folder</th>
<th>Start Date</th>
<th>Due Date</th>
<th>Length</th>
<th>Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make agenda for AMSER EC meeting AUR</td>
<td>AMSER</td>
<td>1 Medium</td>
<td>AUR</td>
<td>Feb 16</td>
<td>no date</td>
<td>none</td>
<td>travelling, AUR</td>
</tr>
<tr>
<td>ACER get ACER spreadsheet of cmte mem...</td>
<td>ACER</td>
<td>0 Low</td>
<td>ACER Pre...</td>
<td>Feb 16</td>
<td>no date</td>
<td>1 min</td>
<td>brandead, tr...</td>
</tr>
<tr>
<td>Finalize organization talk for AUR</td>
<td>AMSER</td>
<td>0 Low</td>
<td>Talks</td>
<td>Feb 16</td>
<td>no date</td>
<td>none</td>
<td>AUR, talks, t...</td>
</tr>
<tr>
<td>Finalize talk for Philips progrqm</td>
<td>AUR</td>
<td>0 Low</td>
<td>Talks</td>
<td></td>
<td></td>
<td>none</td>
<td>AUR, travelling</td>
</tr>
<tr>
<td>Review CORE case 10</td>
<td>CORE</td>
<td>0 Low</td>
<td>CORE cas...</td>
<td>2 hours</td>
<td>none</td>
<td>none</td>
<td>AUR, travelling</td>
</tr>
<tr>
<td>Write agenda for CORE board meeting AUR</td>
<td>CORE</td>
<td>1 Medium</td>
<td>AUR</td>
<td>Feb 21</td>
<td>1 hour</td>
<td>AUR</td>
<td>travelling, AUR</td>
</tr>
<tr>
<td>Look at Radiol...</td>
<td>Radiol...</td>
<td>1 Medium</td>
<td>REW-upd...</td>
<td>Yesterday</td>
<td>no date</td>
<td>none</td>
<td>none</td>
</tr>
<tr>
<td>Radiol...</td>
<td>Radiol...</td>
<td>Low</td>
<td>No Folder</td>
<td>Yesterday</td>
<td>no date</td>
<td>none</td>
<td>none</td>
</tr>
<tr>
<td>Send</td>
<td>Radiol...</td>
<td>Low</td>
<td>No Folder</td>
<td>Yesterday</td>
<td>no date</td>
<td>none</td>
<td>none</td>
</tr>
</tbody>
</table>

**Total Estimated Lengths:** 4.1 hours  
**Displayed Tasks:** 12 active and 0 completed.

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**Notes:**

- Set up specified search searches using any criteria
- I use multiple 'tags' for my contexts
- Filters are a way to quickly hide unimportant tasks. Click the 'Show' button in the toolbar above your to-do list to use filters.
<table>
<thead>
<tr>
<th>Task</th>
<th>Context</th>
<th>Folder</th>
<th>Tag</th>
<th>Start Date</th>
<th>Due Date</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make agenda for AMSER EC meeting AUR</td>
<td>AMSER</td>
<td>AUR 2012</td>
<td>travelling, AUR</td>
<td>2/16/2012</td>
<td></td>
<td>Medium</td>
</tr>
<tr>
<td>Write agenda for CORE board meeting AUR</td>
<td>CORE</td>
<td>AUR 2012</td>
<td>AUR, travelling</td>
<td>2/21/2012</td>
<td></td>
<td>Medium</td>
</tr>
<tr>
<td>Make slides for AMSER business meeting</td>
<td>AMSER</td>
<td>AUR 2012</td>
<td>AUR</td>
<td>2/27/2012</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Meet with Dana to go over her exhibit plans as well...</td>
<td>Radiology Exam/Web</td>
<td>AUR 2012</td>
<td>office, AUR</td>
<td>3/1/2012</td>
<td></td>
<td>Low</td>
</tr>
<tr>
<td>Plan out CORE demo for exhibit</td>
<td>CORE</td>
<td>AUR 2012</td>
<td>AUR</td>
<td>3/5/2012</td>
<td></td>
<td>Low</td>
</tr>
</tbody>
</table>

I would love the audience to hear a little and be able to ask questions (eg "drum up use") - totally your call - if you think images will aid in the process - fine by me!

On 2/22/2012 2:19 PM, Petra J. Lewis wrote:

> Do you want a few slides at some point from the AEC for you or me to show at the AMSER business members meeting?
> IMPORTANT NOTICE REGARDING THIS ELECTRONIC MESSAGE:
> This message is intended for the person to whom it is addressed.

www.mypocketsoft.com/taskangel/
### Started

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Priority</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finalize talk for Philips program</td>
<td>Low</td>
<td>Feb 16, 2012 (Thu)</td>
</tr>
<tr>
<td>ACER get ACER spreadsheet of cmte members organized - joc</td>
<td>Low</td>
<td>Feb 16, 2012 (Thu)</td>
</tr>
<tr>
<td>Finalize organization talk for AUR</td>
<td>Low</td>
<td>Feb 16, 2012 (Thu)</td>
</tr>
<tr>
<td>Review CORE case 10</td>
<td>Low</td>
<td>Feb 16, 2012 (Thu)</td>
</tr>
<tr>
<td>Make agenda for AMSER EC meeting AUR</td>
<td>Medium</td>
<td>Feb 16, 2012 (Thu)</td>
</tr>
<tr>
<td>Write agenda for CORE board meeting AUR</td>
<td>Medium</td>
<td>Feb 21, 2012 (Tue)</td>
</tr>
<tr>
<td>Send new manual to Aaron in PDF form</td>
<td>Low</td>
<td>Feb 24, 2012 (Fri)</td>
</tr>
<tr>
<td>FW: INV 1088 from EXAMWEB</td>
<td>Low</td>
<td>Feb 24, 2012 (Fri)</td>
</tr>
<tr>
<td>Look at Latest version QID database</td>
<td>Medium</td>
<td>Feb 24, 2012 (Fri)</td>
</tr>
</tbody>
</table>

### Today

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Priority</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grocery shop</td>
<td>Medium</td>
<td>Feb 25, 2012 (Sat)</td>
</tr>
<tr>
<td>Run</td>
<td>High</td>
<td>Feb 25, 2012 (Sat)</td>
</tr>
</tbody>
</table>

### Tomorrow

<table>
<thead>
<tr>
<th>Task Description</th>
<th>Priority</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review and incorp edits in REW before webex</td>
<td>Low</td>
<td>Feb 25, 2012 (Sun)</td>
</tr>
<tr>
<td>back up laptop</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
2Do application for iphone
Organization talk for AUR

Actions (to-do tasks)
- get screenshot of joc’s email
- Download more images for talk

Petra Lewis (8 Oct 11 12:52)
need to find images of a straitjacket, light bulb, duh

Created on: 2 Oct 11 22:18
Convert to Project

Write prelim talk
- Finalize talk
- write SAMS

Email chris SAMS

Completed: 1/6
Time: 0 h 0 min. / 10 h 30 min., left: 10 h 30 min.
www.rememberthemilk.com
BBQ sauce for Saturday!

Add an Action:
- Call Melissa, book a haircut
- Call Marc re sales presentation
- [ ] Call Kim re birthday party plans
- [ ] Call uncle paul re New York trip
- Dinner at Del Frisco's?

Smart Contexts:
- Out & About: 14
- On The Gas!: 3
- Brain Dead: 3
- Review Me: 10
- Starred: 4

Tasks:
- Call power company re solar rebates: Install solar panels
- Call Karen and cancel meeting: Try to re-schedule for 5/03
- Call Lawyer re Acquisition details
- Call phone company re phone bill: Account# 3209: (866) 555-2342
- Call Mechanic re oil change: I'm at 3500 miles since my last service
- Email flower supplier re bulk pricing

Settings, Overview, Completed, Logout
Most of the on-line tools allow emails to be sent direct to task lists

Add codes to message line to categorize automatically

Or process later
Organize your data

- Store it in easily accessible places linked to your projects
  - OneNote
  - EverNote
- Consider alphabetizing paper file folders
  - Seems anal, but fastest file and search method
- Save reference source files into easily identifiable folders
- Time spent organizing file cabinet and computer well spent
Conference calls
June 29th 2011
Sept 7th 2011
Next beginning of Jan 2012

For consideration
Changing the name of this committee:
Perhaps the "AMSER Information Technology Committee" ???

Current project updates
Radiology ExamWeb
- Final software upgrades/debugging done
- 1700 students have taken exams in REW
- Current database of approx. 930 question items
- Current database has been categorized against the AMSER curriculum
- >500 additional questions have been submitted by and edited by committee members into single positive answer format and improved question format as per NBME guidelines
- Items/images are now in a format that can be uploaded
- Upload and categorization will be done by end Dec 2011
- Current items have undergone item statistical validation (where deployed >30x) and edited where appropriate
- Areas of the AMSER curriculum not currently tested will be identified and items written (2012 goal)

AMSER Standardized Exam
- Exam topic template has been developed and refined by the committee
- Outline made for 3 'standardized exams' of 100-120 questions each
  - Approximately 2/3 of items will be of the same basic topics in all 3 exams (but different questions per exam) with 1/3 topics varying between the exams
- Awaiting latest REW question item editing and upload before exam can be constructed
- Exam construction scheduled for Jan 2012 (version 1)
- We will need 3-4 pilot sites to test exam before it is made available to AMSER members by AUR 2012
- Versions 2 and 3 to be developed and tested during later 2012 with aim to be available by AUR 2013
is significant variation in interpreting extremely dense and heterogeneously dense.

Basically, we all agreed that just having a history of breast cancer does not “entitle” (sorry to use a judgmental sounding word) women to screening MRI. I think this is important that we all are on the same page on this issue. Many of our patients talk to each other etc and we need to be consistent in our message.

THOUGHTS, IDEAS etc? We discussed yesterday bringing this to tumor board for additional discussion and then perhaps posting these as guidelines for discussion on the intranet.

Thanks

K

Initial thoughts:

Basically agree with what you outlined below.

Personally I avoid recommending MR, screening or otherwise, in the dictated reports on anybody including new cancer pts.

For screening MR requests, I approve it if it comes from our breast surgeons or oncologists or the provider states ”high risk”.

Finally, sorry about not being at meeting. My error.

Helene

http://www.chemie.uni-hamburg.de/gtw/Gesundheit/studium/material/wilslit_03/JAMA.pdf

Hi Kari,

I generally agree with the consensus of the group, with some minor discussion points.

I think breast density has become a more important and recognized risk factor. As you may know many states are in process of legislating informing patients of their breast density of their mammogram. In this regard, I think it would be difficult to turn away a patient interested in MRI screening in someone who has a premenopausal personal h/o Breast Cancer or other significant risk factor (LCIS, ALH, ADH, strong family hx) and extremely dense or hetero dense breasts. This isn’t to say that we should mandate MRI screening in this group.

I believe we should rethink using the GAIL model for lifetime risk assessment. I recall from a prior meeting that the GAIL was felt to not be the best model to use for calculating risk in potential MRI
1. Weekly/biweekly review of projects and actions is critical
2. Define ‘next actions’ for each
3. Daily review of ‘next actions’ sorted by date or priority to decide priorities for that day
Depending on situation and time available

- Have 20 mins and a phone available?
- Traveling with no internet access?
- Have an hour but too brain dead for anything creative?
- In town running errands?
“I don’t have time to get organized”
“You don’t have time NOT to get organized”
Inbox #1

- Compose mail
- Inbox (1,025)
  - Buzz
  - Important
  - Sent Mail
  - Drafts
  - Spam (3)
  - Trash
  - 09 app
  - 2010 shoob eval
  - 2010 thank you notes
  - ACR DXT

Unopened

Inbox

501-600 of 12654
Inbox 1 + Inbox 2

= a 20,000 item ‘to do list’
Email is not a 'to do list'.

- The actual ‘to do’ (task) is usually buried.
- No efficient filtering.
- Between to-dos, information, junk, chat, FYIs.
- No time/date reminders.
- No context reminders.
- No identification of the ‘next action’ that needs to be performed on this email.
Closing email more than once is a waste of time
Constant scrolling
Constant searching
Need to keep reopening emails
Lost tasks
Missed deadlines
Constant growth of inbox
Emails left until tasks completed or beyond
TURN OFF NOTIFICATIONS

Avoid ‘reply all’

Return receipt only if vital

‘Unsubscribe’ >90%

Increase spam filters

Use ‘make rules’ or ‘filters’ to save to a folder/spam/autodelete

Facebook

Coupons

Weekly/monthly/rarely open

Tumor boards you don’t attend
right click on message header to make junk mail or to create rule
1. **Delete**

2. **Reply immediately**
   <1-2mins

3. **Do**
   <1-2mins

4. **Archive email or enclosure**
   Just need to keep for information

5. **Delegate/forward**
   Someone else’s job

6. **Schedule an activity**
   Drag to calendar

7. **Save as a project/action**
   Send to task manager

8. **Delay until later in day**
   If you really will complete this in next 24 hrs
Keep only items you will get to in next 24 hrs in inbox

More than one screen is too much

Consider intermittent review only

hourly, twice-daily, daily,

Process and DELETE
There are no items to show in this view.
Use the corners of time
Efficient use of small amounts of time
Small actions add up
Need to already have defined the actions
Not have to think ‘what do I need to do?’
Context based actions
e.g. ‘phone’, ‘email’
Do it when you think of it
Or add to your task list
Procrastination

- Overwhelmed by the project
- Lack of interest in the project
- Fear of failure
- Unrealistic about time available/required

More than you originally thought
But may not take as much as you fear
✓ Version 1.0 is better than no version

It’s ok to not be perfect

✓ Start with the easy stuff

✓ Break down into single actions

Less overwhelming

✓ Imagine yourself with the task ‘done’
Just start it........

It will never be finished if you never start and invariably isn’t so bad as you thought it was going to be.
✓ Embarrassed to ask?
✓ Not sure who to delegate to?
✓ Not used to being ‘boss’?
✓ Easier to do it yourself?
✓ Faster to do it yourself?
✓ Concerns about outcome?
Delegation

✔ What can you really delegate?

✔ Who to?
  secretary, colleague, resident, student

✔ Never hurts to ask
Keys to success in delegation

- Task must be suitable for delegate
- Convey task details clearly
  - Expectations
  - Deadline
- Shorter deadlines work better
- Follow through after appropriate interval
Organization seems like work that you don’t have time to do
But you don’t have time not to do it
Identifying projects and actions reduces stress
Use an effective organizational tool (not your email in box!)
Learn how to use time more effectively
Summary

- Reduce input as much as possible
- Process email efficiently
- Recognize when you are procrastinating and use a strategy that works for you
- Consider delegating tasks more
Contact me

Petra.lewis@hitchcock.org

Other details about organizational software

How to reduce your inbox to zero from 20,000