

Monthly Review Worksheet

	Notes
<input type="checkbox"/> Review Tickler File	
<input type="checkbox"/> Handle e-mail <input type="checkbox"/> Empty trash and archive sent	
<input type="checkbox"/> Clean In-box <input type="checkbox"/> File papers and notes <input type="checkbox"/> Clean up Capture Device <input type="checkbox"/> Review Contexts <ul style="list-style-type: none"> <input type="checkbox"/> @ _____ <input type="checkbox"/> @ _____ <input type="checkbox"/> @ _____ <input type="checkbox"/> @ _____ <input type="checkbox"/> @ _____ <input type="checkbox"/> @ _____ <input type="checkbox"/> @ _____ <input type="checkbox"/> @ _____ <input type="checkbox"/> @ _____ 	
<input type="checkbox"/> Calendar review <input type="checkbox"/> Close completed items <input type="checkbox"/> Forward incomplete items <input type="checkbox"/> Review upcoming events <input type="checkbox"/> Sync digital and analog	<div style="text-align: center;">Workflow Process</div> <ol style="list-style-type: none"> 1. Collect: Make sure you have all of your notes, clippings, etc. 2. Process: Is it actionable? No – Toss, Tickle, or File Yes – Do, Delegate, or Defer 3. Organize: Put it in the proper category <div style="margin-left: 20px;"> @Projects @Calendar @Next Actions @Waiting for </div>
<input type="checkbox"/> Project Review <input type="checkbox"/> Close and archive completed Projects <input type="checkbox"/> Update current & forthcoming work <ul style="list-style-type: none"> <input type="checkbox"/> <i>Is the project still worthwhile?</i> <input type="checkbox"/> <i>What is being waited on?</i> <input type="checkbox"/> <i>What is the Next Action?</i> <input type="checkbox"/> Schedule new Projects	<ol style="list-style-type: none"> 4. Monthly Review: Review Roles and Responsibilities Review 1-2 year goals Advance current projects
<input type="checkbox"/> Review Someday/Maybe list <input type="checkbox"/> <i>Are Roles/responsibilities in line?</i> <input type="checkbox"/> <i>What can be moved into 1-2 year goals?</i> <input type="checkbox"/> <i>What can be moved into 3-5 year vision?</i>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Mind Map / Brainstorming</div> <div style="background-color: #e0e0e0; height: 150px; border: 1px solid black;"></div>
<input type="checkbox"/> Review Roles/Responsibilities <input type="checkbox"/> Close any completed duties <input type="checkbox"/> Assess Roles vs Values <input type="checkbox"/> Align any new Roles/Responsibilities	
<input type="checkbox"/> Review 1-2 year Goals <input type="checkbox"/> Is the goal still worthwhile? <input type="checkbox"/> Move one into Projects or Next Actions?	
<input type="checkbox"/> Review support files	
<input type="checkbox"/> Brainstorm creative ideas	