

“Unfinished business” trigger list – Professional

- **Projects** that need to be started
- **Projects started**, not completed
- **"Look into"** projects
- **Commitments**/promises to others: boss, partners, colleagues, subordinates, others in organisation, other professionals, customers, other organisations
- **Communications** to make/get: calls, emails, voice mails, faxes, letters, memos
- **Writing** to finish/submit: reports, evaluations, reviews, proposals, articles, marketing material, instructions, summaries, minutes, rewrites and edits, status reporting, conversation and communication tracking
- **Meetings**: upcoming, need to be set or requested, need to be de-briefed
- Significant **read/review**
- **Financial**: cash, budget, balance sheet, income statement, forecasting, credit line, payables, receivables, petty cash, banks, investors
- **Planning**/organising: goals, targets, objectives, business plans, marketing plans, financial plans, upcoming events, presentations, meetings, conferences, travel, vacation
- **Organisation** development: organisation chart, restructuring, lines of authority, job descriptions, facilities, new systems, change initiatives, leadership, succession planning
- **Administration**: legal issues, insurance, personnel, staffing, policies/procedures, training
- **Staff**: hiring, firing, reviews, staff development, communication, morale, feedback, compensation
- **Systems**: phones, computers, software, databases, office equipment, printers, faxes, filing, storage, furniture, fixtures, decorations, supplies, business cards, stationery
- **Sales**: customers, prospects, leads, sales process, training, relationship building, reporting, relationship tracking, customer service
- **Marketing**/promotion: campaigns, materials, public relations
- **Waiting for**: information, delegated projects/tasks, pieces of projects, replies to communications, responses to proposals, answers to questions, submitted items for response/reimbursement, tickets, external actions needed to happen to continue or complete projects... (decisions, changes, implementations, etc.), things ordered
- **Professional development**: training, seminars, things to learn, things to find out, skills to develop or practice, books to read, research, formal education (licensing, degrees), career research, resume

“Unfinished business” trigger list – Personal

- **Projects started**, not completed or Projects that **need to be started**.
- **Projects - other** organisations: service, community, volunteer, spiritual organisation
- **Commitments**/promises to others: spouse, children, parents, family, friends, professionals, returnable items
- **Communications** to make/get: calls, emails, faxes, cards, letters, thank-you's
- **Upcoming events**: birthdays, anniversaries, weddings, graduations, outings, holidays, vacation, misc. travel, dinners, parties, receptions, cultural events, sporting events
- **Family**: projects/activities with spouse, children, parents, relatives
- **Administration**: home office supplies, equipment, phones, answering machines, computers, Internet, TV, VCR, appliances, entertainment, filing, storage, tools
- **Leisure**: books, music, videos, travel, places to visit, people to visit, Web surfing, photography, sports equipment, hobbies, cooking
- **Financial**: bills, banks, investments, loans, taxes, budget, insurance, mortgage, accountants **Legal**
- **Waiting for...**: mail order, repairs, reimbursements, loaned items, information, rsvp's
- **Home/household**: real estate, repairs, construction, remodelling, landlords, heating and air-conditioning, plumbing, electricity, roofs, landscaping, driveways, garages, walls, floors, ceilings, decor, furniture, utilities, appliances, lights and wiring, kitchen stuff, laundry, places to purge, cleaning, organising
- **Health**: doctors, dentist, optometrist, specialists, checkups, diet, food, exercise
- **Personal development**: classes, seminars, education, coaching, career, creative expressions
- **Transportation**: autos, bikes, motorcycles, maintenance, repair, commuting
- **Clothes**: professional, casual, formal, sports, accessories, luggage
- **Pets**
- **Errands**: hardware store, pharmacy, department stores, bank, cleaners, stationers, malls, gifts
- **Community**: neighbourhood, neighbours, service work, schools