












# The Personal Productivity Playbook by CJ Caselli

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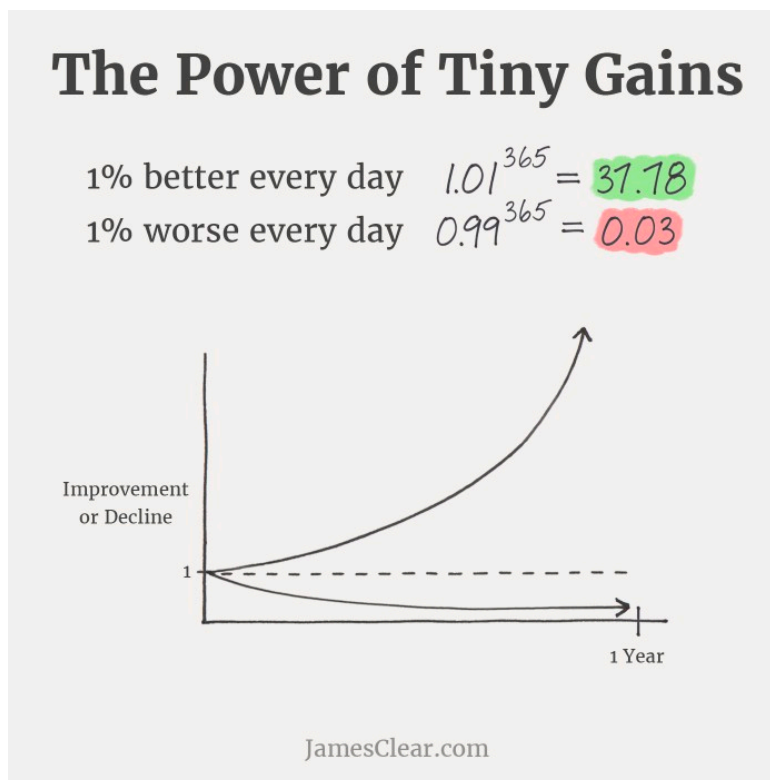
## INTRODUCTION

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### Why should you read this playbook?

Compound growth is typically discussed as a financial concept, but the principle holds true for personal productivity. James Clear, the author of [Atomic Habits](#), refers to this as [continuous improvement](#), which he defines as a dedication to making small changes and improvements every day, with the expectation that those small improvements will add up to something significant.

He goes on to point out that in the beginning, there is basically no difference between making a choice that is 1% better or 1% worse (it won't impact you very much today). But as time goes on, these small improvements or declines compound and you suddenly find a very big gap between people who make slightly better decisions daily and those who don't. **If you get 1% better each day for one year, you'll end up 37x better by the time you're done.**



**Investing time to improve your personal productivity will have a massive impact on your life, particularly if you measure the results over a long period of time.**

## **Who will benefit from this playbook?**

Everyone can benefit from being more productive, but **you'll particularly enjoy this guide if:**

- You're a high achiever who has big goals and ambitions
- You're constantly busy, and when people ask how you're doing, you say "busy"
- You look back on your weeks sometimes and feel like you got nothing done (you want to accomplish more vs. just be busy)
- You're guilty because you're neglecting certain areas of your life even though you consider them important (e.g. working out)
- You have young kids
- You're open to the idea of adding more structure to your life (some personalities will hate this playbook and that's okay)
- You want to be excellent across every area of your life, not just one (e.g. work)

## **Why should you listen to me?**

I've read dozens of books, listened to countless podcasts, and browsed hundreds of articles related to improving personal productivity. **All of these resources contain similar "core truths", and I've summarized the essential concepts in this playbook.**

I've also been frustrated by the complexity of many productivity tools and the unrealistic daily routines of productivity influencers. Most of these folks either 1) don't have kids, or 2) are writing about productivity after they've "made it" (typically through a period of extreme work/life imbalance). Most people can't sleep in until 9am, do ice baths and saunas, work out for 90 minutes, take long walks at lunch, journal, meditate, read a book a week, travel all the time, have a private chef, go to dinner with friends every night, etc. **I'm much more interested in finding out how to be productive in an environment of chaos where you have limited resources (i.e. time, money).**

The systems in this playbook are (mostly) free and have enabled me to accomplish the following each week:

- Work 50-55 hours as CEO of [Truss Vet](#) and Board Advisor to [MyOrthodontist](#)
- Participate in a leadership mentoring group ([Thrivers](#)) that requires 8+ hours per month
- Serve on the member care team at my [church](#)
- Workout 5x per week for 45 minutes each session (this includes travel time)
- Dedicate one hour each morning to read, pray, journal, and get organized

- Spend 2 hours in the morning and 2 hours in the evening with my kids during the week, and then spend most weekends with my family
- Have a weekly date night with my wife
- Take one day off per week (Sunday)
- Average 6.5+ hours of sleep per night
- Read 2 books per month
- Hang out with friends, go to local events, attend church, watch shows/sports, etc.

### **How should you implement these practices?**

It's important to note that **this playbook will not tell you what success looks like**, what is important, or what you should spend your time on. It will simply give you a toolkit for directing your best efforts toward whatever you determine is most important to you.


**Becoming more productive is like getting in better shape (working out).** It takes a lot of time, effort, experimentation, failure, and training. If you're out of shape, you won't be able to go to the gym and do all of the different machines and exercises on day one. But over time and with deliberate effort, you can get into fantastic shape. You also can't magically get fit by buying new gear, trying new apps, or constantly changing your workout routine. The keys to success are discipline, consistency, and focused effort over time.

The fitness analogy holds true for building your "productivity muscles." **You won't be able to utilize all of the tools in this playbook on day one.** You should experiment and incorporate one at a time, practicing discipline and consistency, and look for results in 12 months not in 12 days. You'll be tempted to buy various gear, download overly complex apps, and constantly try the newest productivity "hack." If you're not careful, you can spend all of your time and energy setting yourself up to be productive, which in itself feels productive. Avoid doing this. All roads lead back to the basic principles in this playbook.

Lastly, **it's important to note that I've never had a perfect day.** I have two young kids (3-year old, 1-year old), a wife, a dog, and a fast-growing startup. Every day something pops up and throws a wrench in my workflow. Some days flow perfectly, others are a complete trainwreck. The goal is to practice these productivity methods over 10 years, and the cumulative effect of managing life's chaos and staying focused on your most important priorities is where the real magic happens.

## PRODUCTIVITY PLAYBOOK OVERVIEW

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 ***"Top 0.01% excellence in one area often means making significant sacrifices in other areas (e.g. health, happiness, family, etc). But achieving top 2% excellence across every aspect of life can be done, however, it takes a top 0.01% level of self-discipline."*** - [Michael Girdley](#)

The goal of this playbook is to give you the tools to be more productive and help you achieve top 2% excellence across all aspects of life. The goal is balance, while still achieving high performance across multiple categories.

**Maximizing your personal productivity can be achieved by following these five steps:**

1. Determine what is most important to you (your goals)
2. Focus on those goals while managing the chaos of life
3. Use systems to review your progress
4. Prioritize activities that sustain your energy and motivation
5. Be consistent and measure results over a long period of time

## 1 DETERMINE WHAT IS MOST IMPORTANT TO YOU (YOUR GOALS)

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💡 ***“What you choose to work on, and who you choose to work with, are far more important than how hard you work.” - Naval Ravikant***

Being productive is worthless if you're not working on the right things; it doesn't matter how fast you move if it's in the wrong direction. Said another way, getting stuff done is only helpful if it's in support of your long-term goals, vision, identity, dreams, wants, etc. So how do you make sure you focus your efforts on the most important things? You spend time documenting your vision and goals, life wish list, and identities and habits.

### **1. Life Wish List**

Whether you choose to acknowledge it or not, you likely have a long list of things you want or daydream about. This can literally be anything (e.g. beach house, new car, getting married, running a marathon). Every year as part of your annual goal-planning, create or revisit a Life Wish List by doing the following:

1. Write down a list of everything you want in life. Don't hold back and don't be embarrassed. Whether you choose to acknowledge it or not, that "wish" likely still exists in your brain. This list will be anywhere from 10 to 50 items.
2. Prioritize this list in order of importance to you. Force yourself to put everything in descending order.
3. Each of these items likely has a time or cost associated with it, or both. Try to estimate that and make a note of it to the side. When you start referencing these wishes during your annual goal planning, this will help you ensure you don't try to do too much.

### **2. Vision & Goals**

Your vision and goals clarify what you want out of life and what you want to accomplish. Identifying the most important things to work on each day is impossible without having first determined what is important to you. The Life Wish List you created is a good start, but you also need to consider any goals you have that may not be as easily captured on a wish list. What do you want to accomplish? What does success look like? When you daydream about your life 10 years from now, what do you see? Use your Life Wish List to help inform some of this and make sure they are ultimately aligned.

## The Process:

1. Set an ambitious **10-Year Vision**. It's important to be truly honest here and not let others define success for you. It's also okay to be ambitious. Most people overestimate what they can do in one year and underestimate what they can do in ten years.
2. Sketch out a **3-Year Picture** of what things will look like if you're on track to reach that 10-year Vision.
3. Set **1-Year Goals** that will help you reach that 3-year Picture (3 to 5 total)
4. Set **Quarterly Rocks** that will help you reach those 1-Year Goals (3 to 5 total per 90 days)
5. For the next 90 days, **spend the most 2-4 productive hours of your day on tasks related to those Quarterly Rocks**

[Here is a template you can use.](#)

## How to Set Goals:

The two best methods for setting goals are 1) SMART Goals, or 2) OKRs, described below:

1. When setting goals or rocks, make sure to make them **SMART Goals**: specific, measurable, achievable, relevant, and time-bound. Ideally, at the end of whatever period you've set the goal, you'll be able to answer with a "yes" or "no" as to whether it has been accomplished.
2. You can also utilize **OKRs**, which stands for Objectives and Key Results. The Objective (O) answers the question: "Where do we want to go?" This objective should tell a compelling story; it does not need to be measurable, but it should be inspiring. Key Results (KRs) answer the question: "How do we know that we're getting there?" KRs should be objectively measurable (yes/no).

## Why You Should Call Quarterly Goals "Rocks":

There is an analogy in time management that was popularized by Stephen Covey in his book "The 7 Habits of Highly Effective People." Picture a glass jar where next to it you have:

- Big Rocks - your main priorities or longer-term goals
- Pebbles - your day-to-day responsibilities and shorter-term goals
- Sand - minor tasks that aren't really that important

If you start filling the jar with the sand and then the pebbles, you won't have enough room for the rocks. But if you start with the rocks first, then the pebbles, and then the sand, you'll be

able to get everything done. **The takeaway is to make sure we focus on our highly important (rocks) priorities first before we start tackling other tasks (pebbles, sand).**

### How CJ Sets Goals

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I use SMART Goals paired with my 10-Year Vision in my personal life. At my startup, we use OKRs paired with our 10-Year vision and 3-Year/1-Year goals. The basic principles are the same... where do you want to end up, and what do you need to do today to get there?

I've also incorporated some of [Andrew Huberman's research](#) regarding motivation and goal-setting. He found that for goals you're motivated to pursue, you should visualize success, but for goals you're not motivated to pursue, you should visualize failure.

By going through this planning process, I know each quarter what my most important objectives are, and then I do my best to focus on those objectives for 2 - 4 hours per day during my most energized work times (the morning).

You can find a template of my [goal-planning worksheet here](#).

### **3. Identities & Habits**

 ***"Success is the product of daily habits—not once-in-a-lifetime transformations. Habits are the compound interest of self-improvement. Ultimately, it is your commitment to the process that will determine your progress."* - James Clear**

While goals help you accomplish your vision and wish list, habits help you become who you want to be (they shape your character). If you spend time envisioning your future 10 years from now, it likely includes a description of who you want to be and how people will view you (your identity). It's hard to turn that identity into a set of quarterly goals, but it's much easier to recognize habits that someone with that identity might possess.

In some cases, your habits might be closely linked to your goals, or some goals might require that you build certain habits. That's okay, it's just helpful to separate them out so you can focus on accomplishing your goals (90 days, binary outcome of yes/no) and advancing your habits (daily, how often did you consistently do something).

#### **The Process:**



1. Write down who you want to be, what you want your identity to be, your ideal character traits, what you hope people think about you, etc.
2. Parse out those thoughts into short, tangible categories or identities
3. Write down a few habits for each of the categories that you would like to put into practice to help shape your identity
4. Review these habits regularly to ensure you're making progress or utilize a [habit tracker](#)

### **How CJ Builds Habits**

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Part of my 10-Year Vision contains “identities” for certain areas of my life that I’m trying to cultivate and improve over time. Each quarter, I sketch out (or simply review) habits that I’m putting into place to help advance those identities. I simply have a list of my identities with corresponding habits or actions I’m trying to put into place. I’ll add some of these to the [Streaks](#) app so I can focus on completing them regularly. Here are a few examples:

- **Healthy Body (Identity)**
  - Workout 5x per week: zone 2, zone 5, strength, core/mobility **(Habit)**
  - Sleep 7+ hours per night **(Habit)**
  - Eat mostly whole foods, not processed snacks **(Habit)**
- **Thriving Marriage (Identity)**
  - Weekly family huddle **(Habit)**
  - Weekly date night, at home or out **(Habit)**
  - 6x per year parent's afternoon out **(Habit)**
  - 2x per year vacation with no kids **(Habit)**
- **Vibrant Faith (Identity)**
  - Read devotion or chapter of the Bible daily **(Habit)**
  - Write out prayer daily **(Habit)**
  - Serve as part of the member care team at church **(Habit)**

## 2 FOCUS ON YOUR GOALS WHILE MANAGING THE CHAOS OF LIFE

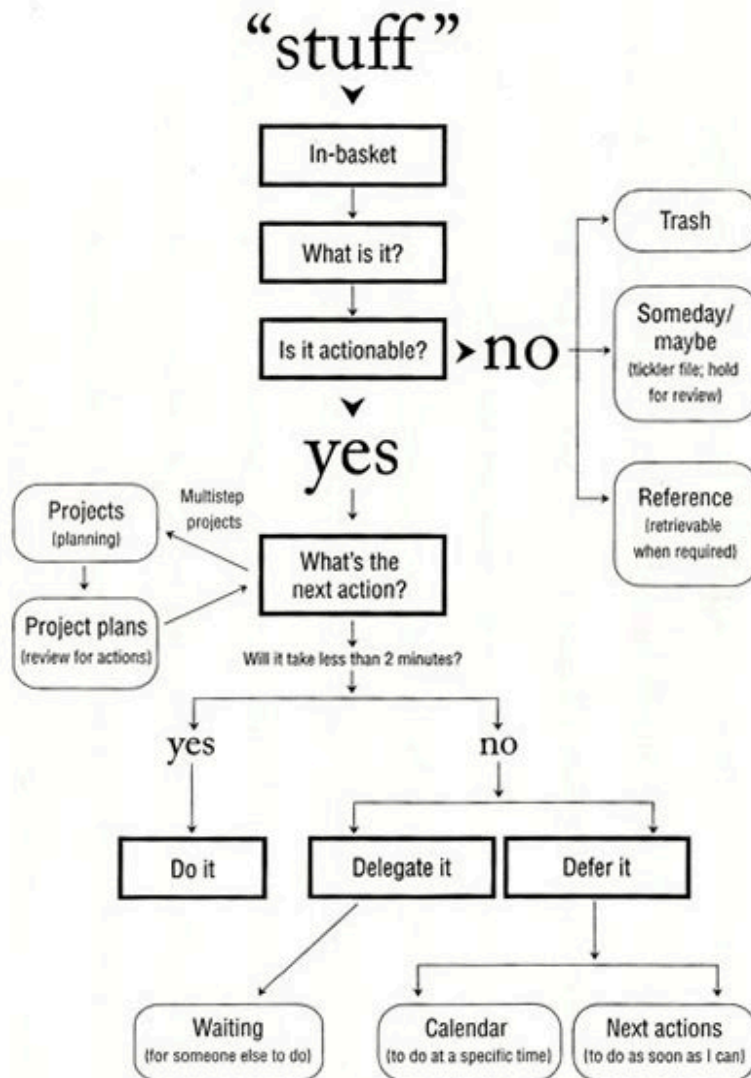
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💡 *“You do not rise to the level of your goals, you fall to the level of your systems.” - James Clear*

All productivity books, blogs, and podcasts can essentially be distilled down into the following frameworks. I utilize all of these processes, but they’re a work in progress. You don’t just flip the switch and master these behaviors. Remember, you’re building a productivity muscle... it takes lots of time, dedication, training, failure, etc. but with consistent effort, you will find yourself becoming much more productive, and “exercising” these frameworks will be much easier (you won’t need as much conscious effort).

### **Getting Things Done (GTD)**

David Allen pioneered this method for task management in his book [Getting Things Done](#). It’s based on the premise that **your mind is for having ideas, not holding them**. You’ll need a method for managing all of life’s tasks and determining how to track them and when to work on them, and this is by far the best method out there. Here is a flowchart of the process:



The GTD methodology and flowchart contain five key steps to organize life's tasks:

1. **Capture:** Write, record, or gather any and everything that has your attention. You'll need a physical collection tool (e.g. folder) and a digital collection tool (e.g. [Todoist](#)). I put literally anything that pops into my head into my [Todoist](#) Inbox to be reviewed later. FYI, the first time you do this, you'll need to do a massive brain dump of everything you're subconsciously tracking. Allen calls this a mind sweep, and he has built a [helpful guide](#) for the first time you do this to trigger all of your open loops.
2. **Clarify:** Now that you've captured everything, you need to process these items one by one and determine 1) what it is, and 2) is it actionable.
3. **Organize:** Once you've clarified the item, you need to organize it based on where it belongs and when it should be addressed. Here is the flow chart explained:
  - a. No, not actionable

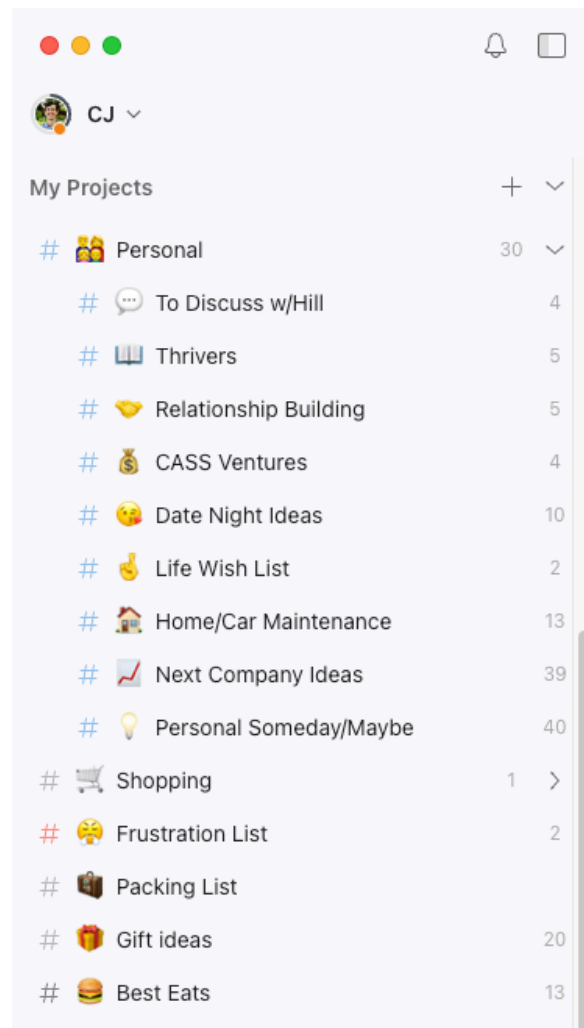
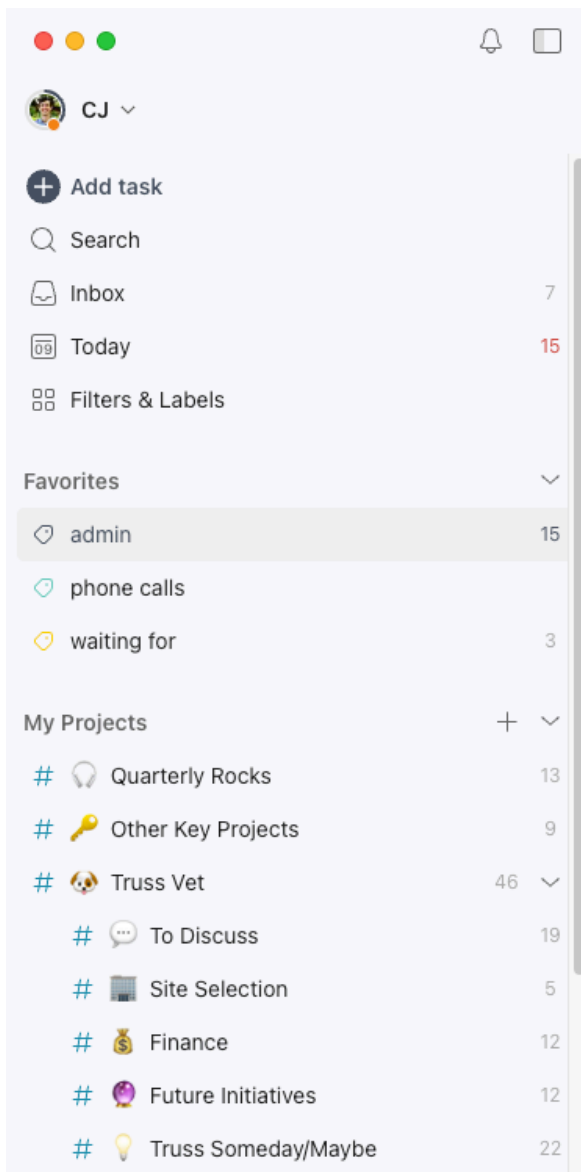
- i. Trash it
  - ii. Put it on a someday/maybe list that you review regularly (monthly or quarterly)
  - iii. If it's reference material, file it away in an organized place so that you can find it later
- b. Yes, actionable... **what is the next action?**
- i. If it's a project...
    1. Create a project and conduct some project planning
    2. Determine the next actions required to complete the project
    3. Skip to step "iii" below as you go to complete the next actions
  - ii. If it will take less than 2 minutes, do it immediately!
  - iii. If it's an actionable task that takes longer than 2 minutes
    1. Delegate it, if possible, to someone else
      - a. Create a "waiting for" list where you can track and check in on the things you've delegated (so you don't spend mental energy wondering if they've been completed)
    2. Defer it to a place where you can take action on it
      - a. Put it on a next actions list where you keep your to-do's
      - b. Schedule it on your calendar when you plan to complete the next action
4. **Reflect:** Every day you will get new tasks, ideas, mail, requests, etc. that need to be sorted. Utilize the organization steps (#3 above) and review your task lists regularly to regain control and focus.
5. **Engage:** Having thoroughly captured and organized everything each day, you're free to trust your systems and simply execute the next actions in front of you with confidence and clarity.

### How CJ Uses the GTD Framework

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I manage most of my tasks and projects in an app called [Todoist](#). I've essentially built out the workflow above in [Todoist](#), and I've trained my brain to dump any thought, idea, or task that pops into my head at any time (even in the middle of the night) into the [Todoist](#) Inbox. Later, I'll go through the process above to clarify, organize, reflect, and then engage. For physical documents and mail, I keep a simple manila folder in my briefcase where I store these items until I can review them (weekly). For a comprehensive overview of how to set up a GTD workflow in [Todoist](#), [read this guide](#). I recognize this process might seem daunting, but once it becomes second nature, you will be amazed about how free and less stressed you are.

My [Todoist](#) setup is constantly evolving, but here is a look at how I have it set up today:



## Timeboxing

💡 ***“A 40 hour time-blocked work week, I estimate, produces the same amount of output as a 60+ hour work week pursued without structure.” - Cal Newport***

A recent [Harvard Business Review article](#) highlighted a study conducted by Filtered of [100 productivity hacks](#) and timeboxing was ranked as the #1 most useful. The concept is based on the idea of migrating your to-do list to your calendar. You decide what to do and when to do it, block out all distractions for that timeboxed period, and get it done. This primarily mitigates

time wasted switching between various tasks (multi-tasking is not productive) and helps reduce the decision fatigue associated with trying to figure out what to do next. If you've spent time scheduling your to-do's, you simply look at your calendar for the day and start working!

### **How CJ Uses Timeboxing**

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I've [synced my Todoist app with Google Calendar](#), which means I can quickly create a to-do (next action) in [Todoist](#) and set a date, time, and duration, and it will show up on my calendar. This has been a game-changer for my productivity, though I still struggle sometimes to stay completely focused on a particular task during its allotted time. Be careful not to fill up your entire day with tasks; you'll likely want to leave  $\frac{1}{3}$  of the day unscheduled to allow for disruptions. But I agree with HBR, this is the best productivity method I've put into practice.

### **Deep Work**

Deep Work is a concept coined by Cal Newport and refers to the idea of **focusing without distraction on a cognitively demanding task**. In our modern world, we're constantly bombarded with notifications, messages, requests, tasks, etc. Newport argues that **to do great work, we need long stretches of focused time without interruption**. Even quickly checking your phone triggers your brain to switch contexts and divert its attention away from whatever important task you are focused on. If you want to accomplish your most ambitious goals, you need to carve out time for deep work.

Jim Collins, the famous business consultant, author, and teacher, also identified the importance of carving out time for focused work, or as he calls it, creative work. Through many years of tracking and optimizing his time, he concluded that to accomplish his goals, he needs to **work 1,000 creative hours in every 365-day window**. No matter where you slice it, no matter if he's sick, busy, or on vacation, he needs to put in the hours. This translates to about 4 to 5 hours of creative (deep work) per day if you remove weekends, sick days, and vacations.

### **How CJ Conducts Deep Work**

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My goal is to conduct 1,000 of deep work each year focused on my quarterly objectives and key projects. I'm most productive during the first third of the day, and I've blocked off 5am - 6am and 9am - 1pm to try to focus on deep work projects and/or learning. When entering deep work mode, I try to set up my environment as follows:

- Put on over-the-ear headphones playing background music via [Noisli](#)
- Set my iPhone to focus mode, which blocks everything except for calls/texts from my favorites

- Close (quit) email, Slack, iMessage, and any other messaging platforms

## **Inbox Zero**

In the workplace, **email is the most distracting and time-wasting activity**. It gives you a sense of busyness and accomplishment when in reality, you've often accomplished nothing. That said, most jobs require you to spend a significant portion of your day in email. The key is to control your inbox instead of having it control you. Remember, very few emails require a response immediately.

There are **two methods you need to utilize to manage your email productively**:

1. Only check your email at 2 - 3 scheduled times per day (30- or 60-minute blocks)
2. Work towards Inbox Zero, which means you've read and addressed each email and either turned it into a task, archived it, or quickly responded (apply the GTD framework)

### **How CJ Reaches Inbox Zero**

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I try to schedule three 30-minute blocks per day where I check my email. I often fail at this because I'm forced to jump in and respond to something time-sensitive, but spending less time in email is a priority for me. I've also set up my Gmail account to work seamlessly with the GTD framework. I've optimized my inbox according to a [popular blog post](#) by Andreas Klinger on how to use Gmail more efficiently. Here is my setup and workflow:

#### **Workflow:**

- When an email comes into my inbox, I address and archive each one by doing the following:
  - a. Respond immediately, if I can do so in 2 minutes or less
  - b. Mark it as "Needs Action" with a yellow exclamation point to work on later
  - c. Delegate it by forwarding it to someone else to complete
  - d. Tag it as "Reference" if it's not actionable but something I'll need to reference later
- For any emails that I've sent that require a response, I'll tag them as "Awaiting Reply" so I don't waste any brainpower trying to remember if it's been addressed
- Once I've gone through all of my emails, I'm at Inbox Zero (everything has been archived)
- I'll then work on any emails-turned-tasks marked as "Needs Action"

#### **Setup (Takes 15 Minutes):**

1. Setup Multiple Inboxes
  - a. Gear Icon (Settings) > Select "Multiple Inboxes"
2. Decide on Your Special Icons (Stars)
  - a. Gear Icon (Settings) > See all settings > General > Stars

- b. Drag the Stars you want to use to “In Use”
- c. I use the following labels:
  - i. Yellow Bang = Needs Action
  - ii. Purple Question = Awaiting Reply
  - iii. Orange Arrow = Delegated
  - iv. Blue Info = Reference

Settings

General Labels **Inbox** Accounts Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat and Meet Advanced Offline Themes Keyboard Shortcuts

[Learn more](#)

**Stars:** Drag the stars between the lists. The stars will rotate in the order shown below when you click successively. To learn the name of a star for search, hover your mouse over the image.

Presets: 1 star 4 stars all stars

In use:

Not in use:

3. Link Special Stars to Your New Inboxes

- a. Gear Icon (Settings) > See all settings > Inbox > Multiple inbox sections

Settings

General Labels **Inbox** Accounts Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat and Meet Advanced

Offline Themes Keyboard Shortcuts

**Inbox type:**

**Multiple inbox sections:**  
Add up to 5 custom sections that you can view alongside your inbox [Learn more](#)

	Search query	Section name (optional)
Section 1:	<input type="text" value="has:yellow-bang"/>	<input type="text" value="Needs Action"/>
Section 2:	<input type="text" value="has:purple-question"/>	<input type="text" value="Awaiting Reply"/>
Section 3:	<input type="text" value="has:orange-guillemet"/>	<input type="text" value="Delegated"/>
Section 4:	<input type="text" value="has:blue-info"/>	<input type="text" value="Reference"/>
Section 5:	<input type="text"/>	<input type="text"/>

4. Enable the Inbox Layout

- a. Gear Icon (Settings) > See all settings > Inbox > Set up like the screenshot below



## Settings

General Labels **Inbox** Accounts Filters and Blocked Addresses Forwarding and POP/IMAP Add-ons Chat and Meet Advanced

Offline Themes Keyboard Shortcuts

**Multiple inbox position:**

- Right of the inbox**
- Above the inbox
- Below the inbox

**Reading pane:**  **Enable reading pane** - provides a way to read mail right next to your list of conversations, making mail reading and writing mail faster and adding more context.

Reading pane position

- No split
- Right of inbox
- Below inbox

**Importance markers:**

- Show markers** - Show a marker (👉) by messages marked as important.
- No markers**

Trust Vet Mail analyzes your new incoming messages to predict what's important, considering things like how you've treated similar messages in the past, how directly the message is addressed to you, and many other factors. [Learn more](#)

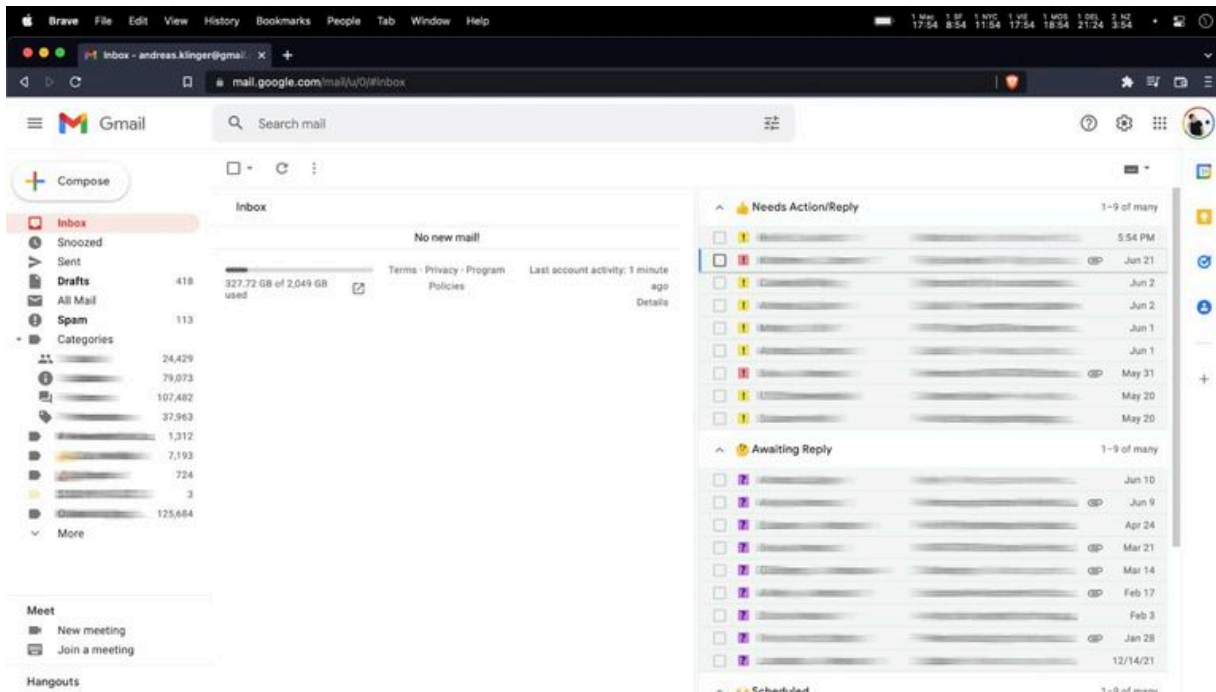
- Use my past actions to predict which messages are important to me.
- Don't use my past actions to predict which messages are important.  
Note: this will erase action history and will likely reduce the accuracy of importance predictions.



**Filtered mail:**

- Override filters** - Include important messages in the inbox that may have been filtered out.
- Don't override filters**

Reload Gmail, and it should look something like the screenshot below:

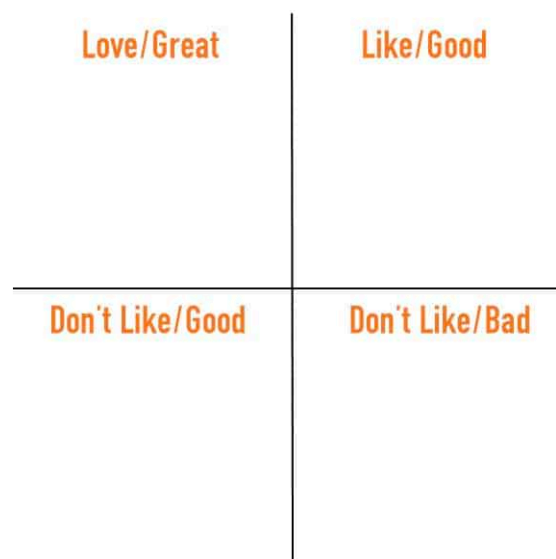


## Automate, Outsource, and Delegate

Part of being productive is **working on the things you 1) enjoy, 2) are good at, and 3) only you can do**. By doing this, you'll spend most of your time in your "Zone of Genius." [Matt Mochary](#) describes the zone of genius as follows:

💡 *"Zone of Genius are the things that you are uniquely good at in the world, and that you love to do (so much so that time and space likely disappear when you do them). This is where you can add most value to the world and yourself. This is where you should be driving toward spending most, if not all, of your time."*

Getting here takes time (years) and is the culmination of a bunch of little efforts to automate, outsource, and delegate the things you do on a regular basis but aren't in your zone of genius. [Traction](#) created a helpful framework called "Delegate and Elevate" for putting this into action:



Take note of everything you do and put it in one of the four quadrants above and further defined below:

1. **Don't Like/Not Good:** Most likely outside of your area of expertise and leave you feeling inadequate and frustrated (*Delegate ASAP*)
2. **Don't Like/Good:** Activities that you are good at doing - you have learned to do them well through repetition and necessity - but that don't give you real satisfaction or a sense of fulfillment. (*Delegate Next*)

3. **Like/Good:** Activities that you can do with minimal effort and that give you enjoyment and satisfaction. *(These are the hardest to delegate, but do so after you've delegated everything in the bottom two quadrants).*
4. **Love/Great (Zone of Genius):** Activities you've mastered, that you love doing, that give you energy and a sense of fulfillment. (Own these tasks and try to spend most of your time here).

**Delegation and outsourcing is a muscle that needs to be built and exercised regularly.** Step one is taking note of everything you do, and step two is working hard to find ways to outsource and delegate items. It's okay if you mess up, the key is to turn this into a regular practice!

**NOTE:** Depending on your level of busyness and level of income, you can get pretty aggressive about outsourcing things in your life. On the personal front, you can hire landscapers, a personal chef, house cleaners, drivers, etc. all of which will free up additional time. On the work front, you can get an executive assistant (EA), whether here in the U.S. or internationally using services like [Shepherd](#) or [Athena](#), which allow you to offload many of the administrative tasks you complete regularly. For more guidance here, check out these resources:

- [Shepherd's Blog](#)
- [First Round: A Tactical Guide to Working with EAs](#)
- [Tim Ferris Podcast with Sam Corcos](#)

#### **How CJ Practices Automation, Outsourcing, and Delegation:**

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I'm still in the early innings of my journey towards my Zone of Genius, but I've taken the following actions:

- **Automation:** If it's a task that I can't outsource but need to do regularly, I'll create a [Todoist](#) recurring task. This gets it out of my brain and relieves the need to remember it. If it's something I order or buy regularly, I try to sign up on [Amazon Subscribe & Save](#).
- **Outsourcing/Delegation:** I have a Google Sheets document ([Template Here](#)) where I keep track of the recurring tasks I do, how long they take (on average), whether they're able to be outsourced or delegated, if I've outsourced them, and then a link to the standard operating procedure (SOP) for how to complete that task. The steps for making progress on this are:
  - Record tasks that you do regularly and identify whether or not they can be outsourced
  - Build SOPs for the tasks that can be outsourced or delegated
  - Review weekly and try to outsource/delegate one item per week
  - Repeat this process on an ongoing basis

## Saying No

💡 “The difference between successful people and really successful people is that really successful people say no to almost everything.” - Warren Buffet

It's pretty simple... **if you want to accomplish your goals, you're going to need to say no to many things that aren't in support of those goals.** This is easy with stuff you don't want to do, but you'll know you've mastered this when you're frequently saying no to things you want to do but just don't advance your goals and priorities. By setting the right goals and priorities and keeping those top-of-mind, it becomes easier to say no.

### **3 USE SYSTEMS TO REVIEW YOUR PROGRESS**

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#### **Daily Task Organization (15 Minutes)**

Throughout the day, you should be dumping any new ideas, tasks, reminders, etc. into your inbox (e.g. [Todoist](#)) to get them out of your head and to avoid working on them in the moment. Then each morning (or the night before), spend 15 minutes cleaning up your [Todoist](#) inbox and scheduling the tasks or putting them in the appropriate list to review later. Also, spend time organizing your calendar for the day to ensure everything is scheduled appropriately (remember to leave  $\frac{1}{3}$  of your day unscheduled for disruptions).

#### **Weekly Review (60 Minutes)**

This is the most important system for managing your progress toward your quarterly goals and objectives. Each Friday, block off 60 minutes for a meeting with yourself, and run through the following:

- Review your goals and habits
- Go through every task and project in [Todoist](#) to make sure the tasks are 1) still relevant, and 2) actionable
- Review any other to-do lists
- Schedule next week's deep work sessions and fill them with tasks related to your quarterly objectives and other key projects
- Try to automate, outsource, or delegate one item that you do regularly but isn't in your zone of genius
- Review your calendar from last week to see if there are any follow-ups needed
- Review your calendar for the next 2-3 weeks to see if you need to prep anything
- Go through all messaging platforms (texts, emails, Slack, social media) and mail to ensure you didn't miss anything and utilize the GTD process to turn anything that needs more attention (greater than 2 minutes) into tasks

#### **Annual Calendar & Ideal Week**

**Annual Calendar:** Other people's priorities will become your own if you don't take control of your schedule. As part of making sure you prioritize the most important things, it's helpful to plan out your calendar at the beginning of the year in one consolidated place. Google Calendar is nice for the day-to-day and week-to-week, but it's hard to quickly glance at the big events,

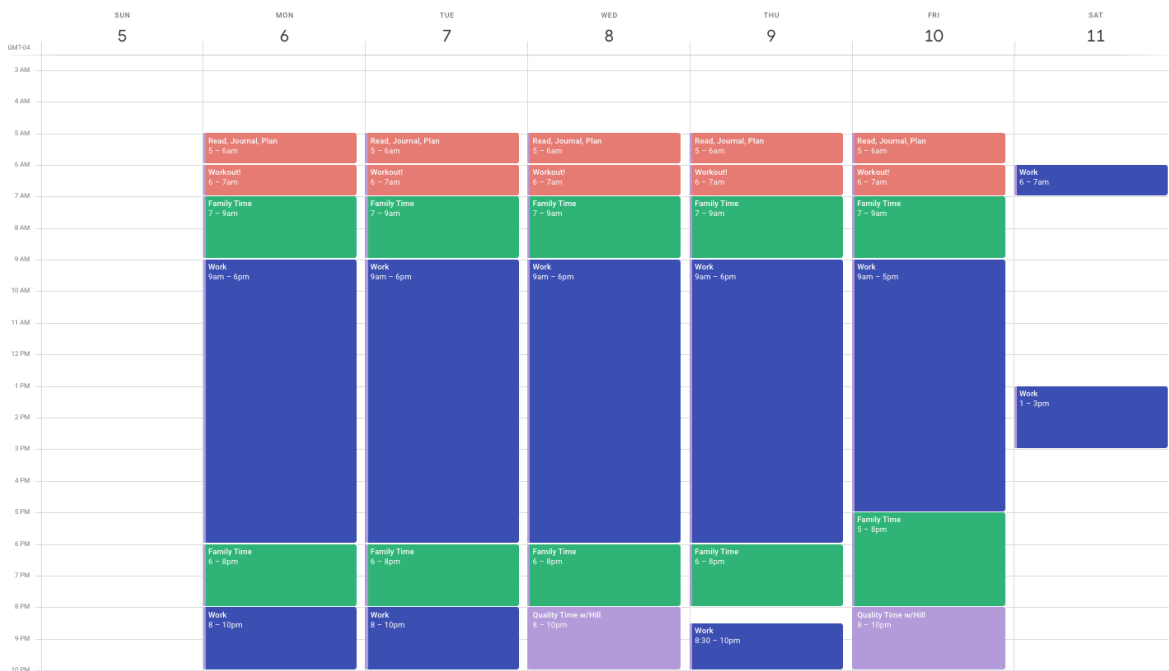
travel, meetings, etc. coming up throughout the year. Ali Abdaal has created a [nice template](#) that allows you to view your “Year at a Glance.” Fill it out and review it regularly to ensure you don’t miss anything, and you plan ahead on the big items in your life.

**Ideal Week:** Time is our most precious resource, and it’s important that we align it with our stated priorities. It’s also helpful to create a “work container” so you know exactly how much time you’re spending on work each week by limiting yourself to those hours. Side note... many people say they work 70, 80, 90 hours a week, but they actually don’t, or they’ve wasted a bunch of time and labeled it as “work.” It’s important to visualize how many hours per week you’re working.

 **How CJ Reviews His Ideal Week**

I target 50 - 55 hours of work per week. [In his research](#), Stanford Economics Professor John Pencavel found that productivity per hour declines sharply when a person works more than 50 hours a week. After 55 hours, productivity drops so much that putting in any more hours might be pointless. And, those who work up to 70 hours a week are only getting the same amount of work done as those who put in the 55 hours.

I’ve created a separate Google Calendar ([instructions here](#)) that I’ve titled “Ideal Week.” During my Weekly Review, I look at this calendar and compare it to how my week actually went. This gives me opportunities to improve or ways I need to update my Ideal Week.



## **Quarterly Review (2 Hours)**

Every quarter (90 days) you need to conduct a Quarterly Review, preferably offsite and somewhere you don't typically work. Spend time reflecting on the following:

- Highlights from the past 90 days
- Whether or not you accomplished your goals
- What prevented you from accomplishing your goals
- Review your 10-Year Vision, 3-Year Picture, 1-Year Goals, Life Wish List, and Habits
- Review your Ideal Week and Annual Calendar
- Review your Someday / Maybe Lists
- Brainstorm a list of everything you want to accomplish next quarter
- Turn this list into 3 to 5 Quarterly Rocks (these may be half personal, half work)
- Identify and document any new habits you want to form related to your goals and identities
- Update [Todoist](#) with your Quarterly Rocks and start identifying and scheduling your next actions

**NOTE:** One time per year this Quarterly Review will actually be an Annual Review. The structure will be fairly similar, except you'll be reflecting on the past year and setting goals for the new year. You still need to identify quarterly rocks for the next 90 days.

## 4 PRIORITIZE ACTIVITIES THAT SUSTAIN YOUR ENERGY AND MOTIVATION

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Life is a marathon, not a sprint. You won't be able to be productive if you're exhausted and burnt out. You need to spend time on the things that you enjoy and provide you with energy. Timebox these activities BEFORE you schedule your work. Work will always consume your free time, so in order to take control of your life, you need to schedule these activities first.

💡 *"A healthy man wants a thousand things, a sick man only wants one" - Confucius*

### Sleep

- Aim for 6.5+ hours
- Go to bed and wake up at the same time each day (or within +/- one hour)
- Keep room cool and dark (use eye mask if needed)
- White noise machine
- If possible, no alcohol during the week (disrupts your sleep)
- No caffeine after 2pm
- Avoid bright overhead lights in the evening if you can
- Avoid phone first thing in the morning and last thing at night

### Fitness

- Weightlifting 3x per week using progressive overload (track your progress)
- Zone 2 cardio 1x - 2x per week (cycling, walking, running)
- Zone 5 cardio 1x per week (cycling, running)
- My current routine, which I simply track in the Apple Notes app:
  - Monday (Pull)
  - Tuesday (Zone 5 Cardio)
  - Wednesday (Legs)
  - Thursday (Zone 2 Cardio)
  - Friday (Push)
  - Saturday or Sunday (Optional Zone 2 Cardio)

### Nutrition

- "Eat food. Not too much. Mostly plants." - Michael Pollan (In Defense of Food)
- Garbage in, garbage out... nutrition does impact your mood and energy levels
- Getting enough protein is important... I do a protein shake with 5mg of creatine most mornings
- Drink a half gallon of water every day (make this easy with a half gallon bottle)
- Meal prep healthy lunches for the week if you can



## Optimal Work Times

- Figure out if you're a morning person or a night owl and lean into that
- Determine when you have the most energy (and least energy) for deep work projects, and schedule your day accordingly. For me, I try to block my day up until 1pm for deep work, learning, etc. and I leave my afternoons for meetings, email management, etc. My lowest point of energy seems to be from 1:30pm - 4pm.
- Andrew Huberman encourages people to think about their day in [three phases](#):
  - **Phase 1 (0-8 hours after waking)**: Our brain and body are more action and focus-oriented in Phase 1 due to elevated dopamine, adrenaline, and cortisol levels. Work on the tasks that require energy and focus. Setting a window for completion, rather than a precise start and stop time, lends flexibility to your schedule.
  - **Phase 2 (9-15 hours after waking)**: Leverage your naturally higher serotonin levels and lower adrenaline, and engage in habits that don't require you to overcome much limbic friction. This is an excellent time for behaviors and thinking that can be completed with less focus. The sort that involves creative exploration is perfect: writing fiction, rough drafts, writing music, play of any kind, experimentation.
  - **Phase 3 (16-24 hours after waking)**: This is when we reset our ability to overcome limbic friction by resting and sleeping.

## Day of Rest (Sabbath)

- Try to take one day off from work per week
- This may be the oldest productivity "hack" in the book, and if it was good enough for God, it should be good enough for you :)

## Other Life-Giving Priorities

- Remember, if you have a demanding job, work will consume your free time unless you proactively take control of your schedule
- Timeboxing and maintaining your calendar actually frees up space for life-giving activities that will re-energize you and bring you fulfillment
- Rigorously block time in advance for things like faith, meditation, family, date nights, time with friends, events, hobbies, travel, or whatever else you enjoy and gives you rest

## 5 BE CONSISTENT AND MEASURE RESULTS OVER A LONG PERIOD OF TIME

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 ***“It’s better to be consistently good than occasionally great.” - Jeff Cunningham / Nick Bare***

I’m amazed at how our minds and our society seem to constantly tell us that success should happen overnight or come easily. If you really dig into any form of “greatness,” you’ll find that it happened through years of consistent effort and hard work. There simply are no shortcuts.

The power of compounding applied to our own self-development can have an enormous impact over time. Be consistent with these productivity methods, maniacally focus on your top priorities, and measure your results over 10 years, not 10 days. I guarantee you will like the results.

## ONE-PAGE PRODUCTIVITY CHECKLIST

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 *“Success is doing ordinary things extraordinarily well.” - Jim Rohn*

### **1. Determine what is most important to you (your goals):**

- Set a 10-year Vision and create your Life Wish List
- Create a 3-year Picture of what things will look like if you're on track to reach that 10-year Vision
- Set 1-Year Goals that will help you reach that 3-Year Picture (3 to 5 total)
- Set Quarterly Rocks that will help you reach those 1-Year Goals (3 to 5 total)
- For the next 90 days, spend the most 2 - 4 productive hours of your day on tasks that will advance those Quarterly Rocks

### **2. Focus on those goals while managing the chaos of life:**

- GTD + Todoist task management system
- Timeboxing + deep work
- Achieve inbox zero
- Outsource, automate, and delegate
- Say no to competing priorities

### **3. Use systems to review your progress:**

- Daily to-do list and calendar review (15 minutes)
- Weekly personal review (60 minutes)
- Review your ideal week and annual calendar
- Quarterly personal review (2 hours)

### **4. Prioritize activities that sustain your energy and motivation:**

- Sleep
- Fitness
- Nutrition
- Community (Family / Marriage / Friends)
- Faith
- Learning
- Rest (one day off per week)

### **5. Be consistent and measure results over a long period of time**

## HELPFUL TOOLS

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You don't need much to manage your productivity. I would encourage you to stay away from the latest (often complex) apps or tools that promise to make you super productive. It's kind of like buying a bunch of new clothes and gear for the gym... it motivates you for a couple of weeks, but actually sucks up a bunch of your time and doesn't make you more fit (or productive). You probably already have everything you need, but if you're curious about the tools I utilize, here are my recommendations:

### Software Tools:

- [Todoist](#) - personal task and project management software
- [Google Calendar](#) - where I manage my calendar
- [Cal.com](#) - quit wasting time coordinating availability
- [Gmail](#) - it's free, easy to use, and customizable
- [Google Docs](#) or [Notion](#) - you need a place for all of your writing and planning
- [Grammarly](#) - amazing for catching spelling and grammar errors
- [Noisli](#) - productivity-focused soundtracks for blocking out surrounding noise
- [Bitwarden](#) - quit using brainpower to remember passwords
- [Pocket](#) - collect all of the articles you want to read in one place
- [Audible](#) / [Libby](#) - consuming audiobooks is a great way to read more
- [ChatGPT](#) - AI seems to be the new frontier for completing time-consuming tasks faster
- [Goodreads](#) - keep track of the books you've read and want to read
- [Streaks](#) - Habit tracker app that is super simple and helps gamify building habits

### Physical Tools:

- [Time Timer](#) - visual timer which can be fun to use with various timeboxed tasks
- **Half Gallon Water Bottle** ([Option 1](#) or [Option 2](#)) - fill it up in the morning, make sure it's gone before you go to bed
- **Headphones** - get [AirPods](#) for calls and over-ear headphones for deep work ([Fancy](#) or [Budget](#))
- **Pens** - I like [these pens](#) for marking up documents and [these pens](#) for writing
- **Journal** - it's still important to write things down; I like [these journals](#) or [these journals](#)
- [Kindle](#) - borrow books from the library using Libby and send them to your kindle
- [Physical Alarm Clock](#) - set it across the room and it will help you wake up early
- [White Noise Machine](#) - have been using this for years to sleep better
- [Eye Mask](#) - if you're traveling or you have lots of light that enters your room
- [Manila Folders](#) - super simple but a great way to organize various documents
- [Monitor Stand](#) - prop up your laptop or computer monitor to reduce neck pain

- [Standing Desk](#) - if you spend a lot of time at your desk, this will make you feel better
- **Charging Block** - never run out of a charge for your phone ([bigger](#) or [smaller](#) options)
- [Hand Sanitizer](#) - keep it at your desk(s) and in your car; getting sick kills your productivity
- [Computer Monitor](#) - you'll be more productive by having double screens
- [Docking Station](#) - connect your laptop to your monitor to leverage dual screens
- [Keyboard and Mouse](#) - you'll need a wireless keyboard and mouse if you get a monitor
- **Stationary** - get in the habit of sending hand-written notes ([budget options](#) or [classy](#))
- [Coasters](#) - part of having a productive workspace is keeping it clean; use coasters
- [Wireless Printer](#) - print documents you really need to focus on when reviewing

**CJ's Productivity Templates:**

- [Goal Planning Worksheet](#)
- [Habit Tracker](#)
- [Year at a Glance](#)
- [Outsourcing Tracker](#)

**NOTE:** I've only listed tools that I personally use regularly. If you have other recommendations for me, please send them my way!

## ADDITIONAL READING

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### Books:

- [Deep Work](#) by Cal Newport
- [Getting Things Done](#) by David Allen
- [Atomic Habits](#) by James Clear
- [The EOS Life](#) by Gino Wickman
- [Traction](#) by Gino Wickman
- [Outlive](#) by Dr. Peter Attia
- [Measure What Matters](#) by John Doerr
- [Make Time](#) by Jake Knapp and John Zeratsky
- [The Common Rule](#) by Justin Earley

### Blogs / Websites:

- [Todoist Blog](#)
- [Ali Abdaal's Website](#)
- [Matt Mochary's CEO Coaching Curriculum](#)
- [Andrew Huberman's Podcast and Website](#)
- [Graham Weaver's Blog](#)
- [On the Nature of Work-Life Integration as CEO](#) - Yale SOM Case Study
- [Tim Ferris Podcast and Blog](#)

## CONNECT

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**Feel Free to Share This Playbook With Anyone:** <http://bit.ly/personalproductivityplaybook>

**Provide Feedback:** Want to share your own tools, tricks, or workflow? Send me an email!