



Migrating from doing to reviewing with ResultsManager™

In response to a thread in the Gyronix forum about migrating from managing actions to reviewing projects, here is a short overview of the lifecycle that ResultsManager supports. If you are already successfully using ResultsManager to carry out reviews, then you can ignore this post - and congratulate yourself on being in a small minority!

An Action dashboard, compiled from your current projects and listing the next actions from those projects, gives you access to information and control at two important levels. First, it shows the "doable" next actions, so that you don't forget something important. Second, by displaying all your next actions in one place, it crudely indicates the effectiveness of your prioritisation process. What does this mean?

The action dashboard is designed to have a "horizon" of a day or two, not weeks or months. The amount of work that it demands of you is a direct result of how well you have prioritised your projects.

Prioritisation means saying no when you had the chance to, pushing things back by setting future start dates, delegating, setting things to someday-maybe (as opposed to committed), or disconnecting from whole projects that are off your radar. If you do none of this, then because software is dumb, it will simply show you a list of to-do actions stretching into an unknown, uncertain and limitless future.

Bizarrely, most people are comfortable with this, because this is how to-do lists have always worked. So when you open your action dashboard, the first step is to choose from the myriad of options that it presents. This is what we call a "hot" action dashboard, in the Gyronix Power Reviewing training module.

Most ResultsManager users are using it this way, and there is nothing "wrong" with this, but the temperature of your action dashboard and your relationship with it give a useful insight into your underlying prioritisation and focus.

The Review process means taking positive steps to reduce the amount of work in your daily action dashboard to something that matches your delivery capacity within the time horizon of the dashboard.

Reviewing, as opposed to doing, means looking dispassionately at an action or project, and asking yourself whether it actually makes a difference. ResultsManager can generate several Review dashboards that collect together your project workload into a single view, helping you take these decisions from a high level, rather than in the heat of the moment.

I know I am not alone in having superheated action dashboards. Everyone has different cultural reasons for reaching that point. Mine are:

1. I would rather cope with an overloaded dashboard by myself than take uncomfortable or unpopular decisions.
2. I have an inbuilt resistance to saying "no" (this goes down well in Japan)
3. I like to be reminded of things, because it often triggers new ideas or perceptions. Very often, the need for an action item changes as it matures like cheese in the action dashboard.
4. I have had some things in my dashboard for so long that they have a right to be there just because they are so well established.
5. Cancelling a project or commitment feels like failure.
6. Starting new things is much more exciting than finishing old ones.
7. I know that if I do set a future date on something, there probably won't be any more time next month than there is this month. So I might as well make a start now.

A bit of tough love on your projects will pay dividends. The contra arguments to the above are:

1. This is a manifestation of procrastination. The sense of control and choice that an overloaded dashboard appears to give is actually working as a smokescreen for measurable progress. I can concentrate on working hard without worrying about whether I am working on the "right" things, which is lazy.
2. I said I would do something, and I haven't done it yet. Which is actually worse - saying no, or saying yes and not doing it?
3. Continually revisiting and reconsidering things without doing them is a drain on resources. If the price of finishing some things is forgetting others, this might be a better position than finishing fewer things overall.
4. The value of an action can be very dependent on the timing. Often you find that when you do eventually finish something late, it turned out to be unnecessary or unappreciated. As a scientist once said, "If something is worth doing, it's worth doing quickly".
5. If I haven't finished it, I have failed anyway. Being convinced that I will eventually do something is not itself a valid deliverable.
6. To start something new, you have to stop doing something else. Nobody I know is sitting waiting for something to do. Unless you have major displacement activities that you can get rid of, deciding to start a new project means cancelling or delaying something else.
7. The illusion that next month is relatively empty, while this month is overcrowded, continues to defy logic and experience. If you assume that next week or next month will be just as bad as this week or this month, which history tells you is much more likely, then it could be better to decide between two projects now instead of trying to delay the decision.

These decisions are part of your review process, which for most users is a question of deferring, cancelling or delegating projects to get your action dashboard down to a manageable level. ResultsManager's ability to visualise the balance between prioritisation capabilities and delivery capacity is something that is fairly unique, and not too comfortable for most of us.

The better news is that I know there are many users in this group who do have effective and smooth-running review processes, supported by ResultsManager. Technology cannot take the credit for this; it just makes it easier to express the core productivity skills possessed by these users.

How In-trays work in ResultsManager™

In response to questions posted on the MindManager® Users Yahoo group, and because it is something that is not too clear for many users, here is an overview of how the "In-tray" system works in ResultsManager and GyroQ. If you already have your in-trays under control, you can ignore this post.

The first part of the jigsaw is the in-tray concept itself. Information relating to a project, gathered together in a map, may have several different statuses. For example, it may be a committed action, or it might be something that still needs a decision, such as a new idea. Often, you receive a new piece of information or think of an idea relating to a project, but you don't have the time to think about the implications and take a decision on it. The "in-tray" section of a project map is intended to hold this type of information or idea. Placing something in the in-tray for later processing means that it is captured into your system, but eventually you will need to work on it some more to integrate it, and move it somewhere else in your map. The in-tray can contain actions or just regular topics that might become actions later. You can think of it as a "rolling brainstorm" section of your map, kept separate so that there is no confusion about the status of the things in there.

ResultsManager picks up action items sitting in in-trays and shows them in action dashboards. So you can put an action into an in-tray and it will appear in your dashboards, grouped together with other actions by context or however you have coded it.

Normally, the in-tray itself is coded as an action item (for reasons described below), but does not get listed as an action in the action dashboards. There are filters in the dashboards that will exclude in-tray topics themselves, but will let through action items that they contain.

ResultsManager uses in-trays in dashboard maps in two ways, to help with project management and review.

All the in-trays from project maps scanned for the Power User Action Dashboard are listed together. This is so that you can add an action straight to the in-tray from within the action dashboard, and it will get added to the in-tray of the original project map (ResultsManager Pro only). So from your action dashboard, you can post ideas for new actions to any of your current projects, without visiting the project map itself. Note that this listing of in-trays does not imply an action, or presence of actions in the in-trays; if they contain any qualifying actions, then these will be listed on the left of the action dashboard, mixed in with regular project actions anyway.

The Power User Sweep-up Dashboard, and the Express Sweep & Review Dashboard also list actions sitting in in-trays, not so that you can deliver them, but so that you can visit the in-tray and process it. During the review process it is a good idea to revisit things sitting in the in-trays and take decisions about their future. Note that if an in-tray does not contain any actions, you may still need to visit it, to make sure that it does not contain any forgotten surprises.

GyroQ supports the in-tray process with the command that moves topics from one map to another. If you have GyroQ installed, and right-click on a topic, you can move it to the in-tray of another map.

If the destination map does not contain an in-tray main topic, GyroQ creates one, using the same mark-up that ResultsManager recognises.

So if you use GyroQ to create an action item, and then move it from your capture map to the in-tray of a project map, it is already integrated into the ResultsManager dashboard system and will appear in your action and review dashboards.

How Inheritance works in ResultsManager™

Inheritance from parent tasks to child tasks works as follows. It can look complicated, but the objective is to minimise the amount of re-entry of data required to put a small project together.

The descriptions assume that Automatic Delegation and Funnel Timelines are enabled in the ResultsManager options, which is the default, and the speediest way to define projects in maps.

"Parent task" below refers to the next available topic with a percent complete icon, when moving up towards the central topic. With Funnel Timelines enabled, the parent task will be a successor. Non-task topics separating children from their parents are transparent to the inheritance process.

1. **Someday-Maybe and Committed markers**

If undefined, inherit from the parent task. If defined, overrides any inherited setting. By default, tasks are regarded as Committed by default unless they are otherwise defined, or inherit a setting.

2. **Priority**

If undefined, inherit from parent task. If defined, then the new level is used, unless the new priority level is lower than that inherited from the parent task. This avoids the error of setting a task predecessor to a lower priority than the task itself. For example, if booking a hotel room is Priority 1, then finding the hotel phone number should not be a lower priority task, as it might get omitted by dashboards.

3. **Categories and Contexts**

If undefined (blank), inherit from the parent task. If defined, does not inherit from the parent.

4. **Areas**

If undefined, inherit from the parent task. If defined, then the new Area is added to those inherited from the parent topic. So a topic can be a member of more than one Area by successively defining more detail; e.g. Sales / Sales Europe / Sales UK.

5. **Owner**

If undefined, inherit from the parent. If defined, and the parent task has an owner, then the newly defined owner is assumed to have been delegated this task by the owner of the parent task. So if task 1 is owned by Bob, and predecessor (subtopic) task 1.1 is owned by Jane, then Jane owes task 1.1 to Bob.

6. **Due date**

If undefined, then the due date of the parent task, minus its duration (if given) is taken as the due date for this predecessor task.

7. **Start date**

If undefined, then inherit from the parent project or sub-project. The start date controls when tasks will appear in action dashboards. You can shift the start of a whole project backwards or forwards by changing the start date of the project or sub-project topic, and leaving the start dates of the individual tasks empty. If a start date is defined for a task that would clash with its due date when taking its duration into account, the start date is brought forward to suit when the task is displayed in an action dashboard.

Usual practice is to make the central topic of a project map into a project topic, and define yourself as the owner of the project, plus any other global settings such as context. Then you only need to mark up exceptions to this in the rest of the map. If you do not define yourself as the project owner, then ResultsManager will not display delegated tasks as owed to you in your action dashboards. This is usually the cause of missing items in the Relationship Central area.

Mindjet MindManager®, Gyronix ResultsManager™ for MindManager®, and Gyronix GyroQ™ for MindManager are all at www.gyronix.com.