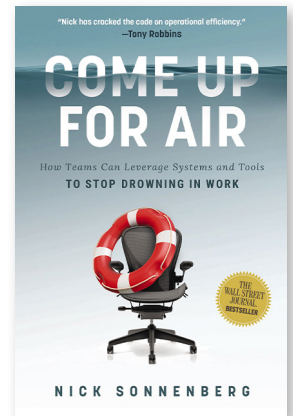


Come Up for Air

How Teams Can Leverage Systems and Tools to Stop Drowning in Work

by **Nick Sonnenberg**



Contents

The CPR Framework

Page 2

Communication

Page 2

Inbox Zero

Page 3

Planning

Page 4

Efficient Meetings

Page 4

Workloads and Capacities

Page 5

Goals and Planning

Page 6

Resources

Page 6

THE SUMMARY IN BRIEF

How many times have you heard someone utter the phrase, “I’m drowning in work”? If you’re like most people, it’s a frighteningly common occurrence. You’re busy and operating at max capacity, yet the flow of incoming work never lets up. You and your team are perpetually overwhelmed and working late nights and weekends become the normal way of operating. It doesn’t have to be that way.

In *Come Up for Air: How Teams Can Leverage Systems and Tools to Stop Drowning in Work*, author Nick Sonnenberg shares his proven operational efficiency framework that will help you and your team understand how to work together efficiently by knowing when and how to use all of the amazing technology at your disposal. Eliminate thousands of seemingly small inefficiencies at work that add up over time to become major drains on everyone’s productivity. It’s all possible with the CPR Framework, which helps teams harness the power of new systems and tools to multiply their capabilities, operate efficiently, and embrace the future of work.

IN THIS SUMMARY, YOU WILL LEARN:

- The three domains of the CPR Framework
- How to organize and best use communication at work
- How to implement a four-domain planning process
- Storing resources to protect company knowledge

The CPR Framework

PROBLEM: Most teams are drowning in work because they're using yesterday's methods in today's fast-paced environment. Either they're unaware of modern tools or they lack knowledge around when and how to best use them, which holds them back from streamlining the way they work.

SOLUTION: Aligning as a team on when and how to use each available tool is the best way to remove roadblocks to get work done faster. This alignment can quickly create a more productive, less stressful, and more enjoyable work environment.

The CPR Framework focuses on eliminating the pain points most teams experience by optimizing the three operational areas foundational to every organization: Communication, Planning, and Resources.

Regardless of size or industry, all organizations need to *communicate* (with their team and with external people such as investors, customers, vendors, and partners); *plan* and manage the work that needs to get done; and document all of their proprietary *resources* and knowledge (such as standard operating procedures and processes) to ensure that the business continues to run like a well-oiled machine.

Efficiency in all three of these domains can be boosted with the use of tools. If teams don't know how to use the right tools, in the right ways at the right time, they'll be left drowning in work. Digital tools used in the right ways at the right times allows teams to come up for air. The overarching principle is that knowing when and how to use each type of tool is far more important than the tools themselves.

There are many highly functional tools within each of these categories that effectively do the same thing. The problem is that people are not using them correctly and teams are not aligned on when and how to use each. *This is the primary problem that the CPR Framework solves.*

Defining the tools within the CPR Framework

- **Email Tools:** used only for communication with people *outside of your organization*
- **Internal Communication Tools:** used for *communication internally* with team, not managing work (Slack, Microsoft Teams, etc)
- **Work Management Tools:** *used for getting work done* (Asana, ClickUp, Monday.com, Jira, etc)

- **Knowledge Base Tools:** used to store information and answers the questions: *Who, What, Where, When, and/or Why?* (Coda, SharePoint, Notion, Confluence, etc)
- **Process Management Tools:** used to document and optimize recurring processes within your organization, answering the question: *How?* (Process Street, Pipefy, SweetProcess, etc)

These foundational elements are crucial for anyone looking to embrace and implement the CPR Framework.

Part 1: Communication

Today, the value of communication networks is almost incomprehensible. But as technology increases, the number of interactions increases exponentially. This increases the value of the network, but it also creates a whole lot of noise and complexity.

We live at a time where it has never been easier, quicker, or cheaper to communicate with someone anywhere in the world whether that's via an email, text message, phone call, WhatsApp message, Zoom meeting, social media comment, or anything else. The problem is that as the number of interactions increases exponentially, *so does the time required to process them.* But technology itself is not the problem. The problem is that we're using it wrong. *And we have been for decades.* That ends now.

Principles of Efficient Communication

PROBLEM: With so many communication methods available, the modern workplace has become distracting and overwhelming. Messages can be hard to find or go unnoticed, affecting culture and making it difficult to move work along.

SOLUTION: By aligning when to use each type of communication method available to them, teams can limit distractions, reduce the Scavenger Hunt, and free up their time to get work done without all the headaches.

Teams often fail to understand the importance of organizing communication, and this is how the Scavenger Hunt starts. In the moment, we optimize the speed of transfer of information and go for the path of least resistance. But unfortunately, the few seconds saved in the short term end up costing us in the long term.

When you need to find a past message, you're now wondering if it was sent in an email, on Slack, or on a sticky note someone placed on your desk. You need a system for

An obvious productivity hack is to rely on asynchronous communication as much as possible whenever appropriate.

organizing communications at work.

Most organizations are set up in a “push” communication environment, where information is pushed out to you non-stop as a result of optimizing solely for speed. The barrage of incoming information is a distraction that takes teams out of their flow states and away from their most important work, creating one of the largest time sucks seen in companies.

Instead, you and your team need to be able to “pull” the information you need when you need it. When done correctly, you’ll still be able to get information sent and off your plate, but it won’t cause an immediate distraction to the person you’re communicating with. This limits distractions and allows everyone to take back control of their workflow and decide when to communicate and when to focus on work.

A “pull” environment leverages the notion that some times of the day are more valuable than others. Peak times vary from person to person and each individual should focus on their most important work when their brains are at full horsepower. The benefits extend by aligning on when and how to best use asynchronous communication.

An obvious productivity hack is to rely on asynchronous communication as much as possible whenever appropriate. This allows you to reduce distractions, optimize time, and provide a way to easily retrieve information. Asynchronous communication can easily be misinterpreted or misunderstood.

If the communication is straightforward and simple, conducting it asynchronously is a win for everyone involved. But when it’s not, it can cause further problems down the line, making it less efficient in the end.

Communication that requires tonality, context, or a personal touch should be conducted synchronously, in real time. Here are a few quick examples of situations when synchronous communication is typically better in a team environment:

- Providing lengthy feedback
- Brainstorming

- Situations that involve many questions or back-and-forth conversations
- Anytime you need to make sure everyone is on the same page
- Sensitive conversations like promotions or terminations

External vs Internal Communication

External communication is when you’re communicating with anyone outside your organization, like a partner, vendor, agency, client, or potential new hire. Internal communication is, of course, when you’re communicating with people inside your organization.

Separating these two types of communication into the right tool for the right job is crucial for both efficient communication and the retrieval of information. The rule is that email should be used for external communication only, while internal communication tools like Slack and Microsoft Teams should be used for internal communication. This separation is typically the fastest way to alleviate the Scavenger Hunt in most organizations.

Inbox Zero

We’ve already established that email should be the default method for external communication. But for all the amazing value email provides us, it is one of the most dreaded tools in the modern marketplace. There’s an important concept that everyone must understand if they want to regain control of their inbox. Forget everything you’ve ever heard about email and replace it with this simple definition:

Email is just an external to-do list that others can add to.

Without the right restraints in place, other people can control your time through email. Inbox Zero is a method for managing your inbox that allows you to quickly and easily deal with every email that comes to your inbox.

Getting to Inbox Zero for the first time involves three key steps.

1. Cut out the noise: Use filtering options in your setting to divert unimportant emails from getting to your inbox in the first place.

2. Rip the band-aid off: This involves selecting all emails in your inbox that are older than thirty days and archiving them. By archiving them, they are not gone forever...you'll still be able to access them by using the search function.

3. The R.A.D. System: This is what you'll be using on a daily basis to maintain Inbox Zero. R.A.D. stands for Reply, Archive, or Defer, which are the three actions you can take when an email comes to your inbox.

- Reply: If it requires a reply, reply to it and then archive it. That email has been dealt with and no longer needs to be sitting in your inbox.
- Archive: If you've already responded or they don't warrant a response, archive them.
- Defer: If an email is not relevant now or you don't have time to deal with it immediately, snooze it to a time when you will be more available.

The goal is to always reply, archive, or defer until there is nothing left, or until just a few actionable emails remain, which you will deal with in the near future.

Part 2: Planning

Projects, whether you realize it or not, are a fundamental part of nearly all our lives. They create value out of thin air and make up a significant portion of our economy. But there's a problem. The unfortunate reality is that around 70 percent of projects in the workplace fail.

This happens because most organizations don't have a framework for deciding which ones to focus on and how to work through them in the most efficient and effective ways. There are four components that culminate in a planning framework that is flexible, efficient, and applicable to nearly any industry.

Efficient Meetings

PROBLEM: More often than not, meetings are ineffective, and, at times, completely unnecessary. They're one of the largest sources of inefficiency in organizations, preventing teams from getting their actual work done.

SOLUTION: The cost, frequency, and length of meetings can be reduced through simple techniques like asynchronous communication, agendas, prework, and more. The result is more time for important work and less time spent in unnecessary, unproductive meetings.

The biggest tip regarding meetings is to simply eliminate

them. People tend to hop on a call or schedule a meeting every time a minor hiccup occurs and it needs to stop.

There are two ways that can happen:

- Deleting it or never scheduling it in the first place
- Conducting it asynchronously

The first is self-explanatory. The second, however, can be done in a variety of ways. You can cover what needs to be said in a few messages with your internal communication tool. Or maybe it can be covered with a task in your work management tool. The other way is to use video or audio recordings to hold what is effectively an asynchronous meeting.

If a meeting needs to be held, to brainstorm, solve complex problems, deal with sensitive issues, or build culture and rapport with the team, there are strategies you can use to make it shorter, more cost effective, and less painful:

- Keep it short
- Account for breaks between meetings
- Audit the attendees, considering who truly needs to be there
- Assign pre work to get everyone prepared
- Avoid round robin reporting
- Use an agenda
- Assign a moderator and a note taker
- Organize action items
- Track decisions made in the meeting

Making meetings more efficient is one of the quickest wins you can implement. The next components will focus on how to set up your work management tool in the best way possible, which is crucial for team productivity.

Principles of Efficient Work Management

PROBLEM: The information required to move work forward is often spread across multiple tools and places, which is inefficient and frustrating.

SOLUTION: Organizing all work-related information in one purpose-built tool gives everyone access to what they need to get work done, provides unparalleled visibility and transparency, and seamlessly organizes all the moving parts involved in tasks and projects.

Most knowledge workers juggle so many different re-

Most people don't know their true bandwidth because they've never taken into account how much time they spend in meetings and other activities within their role.

sponsibilities from day to day that it can be difficult to remember everything you're supposed to do and all the commitments you've made to your fellow team members. And when everyone has their own way of organizing their work, it only makes it more difficult.

Work management tools are key to facilitate all daily work, manage projects, and plan long-term initiatives. A work management tool is like a to-do list, but instead of a notepad it's an all-encompassing collaborative to-do list in the cloud for your entire team. When used properly, everyone knows what to work on and when.

At the highest level, a work management tool should be used for anything *actionable*. If you want to know something is going to get done, this is the best place to put it. Once work is in the tool itself, all relevant questions, updates, ideas, and thoughts related to that work should then be added to the relevant task, project, or portfolio within your work management tool.

A work management tool is optimized to retrieve work-related information. Anytime anyone needs to get work done, they can hop into this tool and find everything you need—whether that's a critical attachment or information from a team member's work that will help them move their work along.

As you begin using a work management tool with your team, keep in mind this core principle: if it's related to work that is being done or will be done, it goes in your work management tool. It goes in your work management tool if you:

- Have a question about a task
- Want to delegate something
- Have a status update about your work
- Want to capture the state of something
- Need any action of any kind to be taken
- Want to know that it's going to get done

To keep yourself and your team more productive within a work management tool, there are two things you and your team should be doing on a regular basis:

1. Respond to comments so you unblock your colleagues and tasks move along.
2. Organize your own tasks to stay on top of incoming work and keep your to-do list tidy.

Just by doing this, you and your team will get significant value from your work management tool.

Workloads and Capacities

PROBLEM: Most people don't know their true bandwidth because they've never taken into account how much time they spend in meetings and other activities within their role. This results in unrealistic estimates of how much time it takes to do new work and long hours to get everything done.

SOLUTION: Accounting for time spent in meetings and on administrative tasks is the key to calculating your true bandwidth. Once this calculation is done, people can assign themselves a realistic workload and still ensure the highest-priority work gets done.

Sprint planning is the process you'll use to prioritize everyone's time and ensure that progress is being made on those projects while also allocating the right amount of time for everything else. Simply put, the idea is for a team to agree to complete a certain amount of work within a short period of time called a "sprint." The team will work on what needs to happen to move the project forward and agree to complete the highest priority tasks during the upcoming sprint.

Most people assume that they have forty hours of bandwidth every week, but they don't account for time spent in meetings, admin tasks, recurring work essential to their role, and email. As a result, they bite off more than they can chew and at the end of the week, they haven't even come close to getting everything done and they feel underwater. This is the problem that sprint planning solves and it all revolves around a simple formula:

Bandwidth = Capacity - Admin - Meetings

- Bandwidth: time available for new work
- Capacity: the total time you're expected to work (say,

forty hours per week)

- Admin: time spent on administrative tasks and other responsibilities within your role
- Meetings: time spent in meetings

At the beginning of each sprint, which is typically done weekly, you take your *capacity*, then subtract the time you estimate spending on *admin* and *meetings* during the upcoming sprint. This will leave you with your remaining *bandwidth*, which is the amount of time you can dedicate toward new tasks. By adding an estimated number of hours to your tasks, you can then just assign yourself the highest-priority tasks until you've used all your remaining bandwidth. That way, you've given yourself a reasonable amount of new work to do, ensuring you won't be overloaded.

This might seem like an overly simple process, and it is. *The problem is that no one actually does it!* And it's the primary reason why so many people feel underwater at work. Sprint planning has the potential to drastically improve the way you and your team work from week to week and is perhaps the most effective way for teams to come up for air.

Goals and Planning

PROBLEM: Most organizations don't hit their goals. It's not because they aren't capable but because they don't have a system for aligning on what matters most, measuring their progress, and tying goals to the work needed to achieve them.

SOLUTION: Implementing a goal-setting system that enables a team to align on what matters most, track progress in real time, and clarify what success looks like is the key to making consistent progress toward achieving an organization's long-term mission.

Organizations need to have goals to push themselves forward, but more importantly, they need a plan for how to achieve them without taking the time to think through even the most basic questions surrounding them, like:

- How will we know we've achieved the goal?
- How and where are we going to measure our progress?
- What work needs to get done to achieve the goal?

Implementing a clear strategy for setting and achieving goals is one of the best leverage points in any business. Planning strategies improve both efficiency and effectiveness.

One system that works well is called Objectives and Key Results (OKRs.) It's a collaborative goal-setting framework

that empowers teams and individuals to create challenging, ambitious goals with measurable results. OKRs provide clarity, focus, alignment, and accountability.

OKRs consist of two components: an objective and three to five key results. Objectives are large, qualitative goals that are then tied to several key results. Key results are quantitative measures that are used to define the success of the objective they're tied to. Measurability is what defines a key result. That is how you gain clarity on whether or not it has been achieved.

With OKRs, the idea is to visualize where you want to be a year from now and consider what needs to happen from quarter to quarter to feel like you've made meaningful progress. This is then put into practice by creating both annual and quarterly OKRs.

Here is an example:

Objective: Improve Financial Health

Key Result 1: increase profit from \$10 to \$40 million

Key Result 2: increase revenue from \$50 to \$100 million

Key Result 3: increase annual recurring revenue from \$30 to \$80 million

Key Result 4: increase LTV:CAC ratio from 1.5 to 2

This is an annual OKR, and you can see how it would make sense to break it down into four quarterly OKRs to make sure consistent progress is made throughout the year. OKRs serve as your north star.

They provide direction on priority, so that everyone at an organization understands what matters most in the given time frame.

Part 3: Resources

As an organization grows, it accumulates information and assets. How to do certain activities, who does what, policies, files, and documents all accumulate over time. This turns into intellectual property (IP) of the company itself. While you might think of IP only in relation to products and services, *the way people operate and how things work is just as important*. Really, IP includes all of the systems, processes, workflows, and assets it takes to run an organization. This "company knowledge" is a living, breathing part of an organization.

The problem is that company knowledge typically lives in

the minds of the people who work there, not the company itself. When they leave, the knowledge goes with them and can cause some serious problems. The R in CPR is all about setting up a system where that information isn't just floating around in people's brains but is strategically stored within the company itself.

In order to put this into practice, company knowledge must be separated into two categories: static and dynamic. Static knowledge consists of facts and information and consists of things like company vision and mission, core values, PTO policies, health care information, style guides, branding assets, client testimonials, and the like.

Dynamic knowledge is used to facilitate work. Things like how to run payroll, onboard a new hire, update metrics, and such. When documented properly, it allows anyone to complete a process regardless of training or experience.

Separating and documenting these two types of knowledge into a knowledge base and a process management tool is the best way to document a company's intellectual property.

The CPR Framework has the potential to change many lives and businesses. It gives you and your team the gift of time and makes you ready to embrace the future of work.



Nick Sonnenberg is an entrepreneur, WSJ Bestselling Author, Inc. columnist, and guest lecturer at Columbia University. He is the founder and CEO of Leverage, a leading operational efficiency consultancy that helps companies implement the CPR® Business Efficiency Membership, which consistently results in greater output, less stress, happier employees, and the potential to gain an extra full day per week in productivity per person. Nick and his team have worked with organizations of all sizes and across all industries, from high-growth startups to Fortune 10.

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