



# SORT WORKSHEET

**PURPOSE:** *Sorting through the significant amount of information you gathered during your investigation stage is an important part of the process. Your challenge now is to turn it into an organized and useful summary that will guide planning and implementation.*

<p><b>Your Belief System</b></p>	<p>Before you begin to sort through information, make a conscious decision to be OPEN MINDED! Your job is to consider information without bias or pre-conceived notions about truth. However, being OPEN MINDED takes mental and physical energy. Respond to the prompts below to make a plan on how you will nurture open-mindedness.</p> <p>What is your plan to find sufficient time, when you are rested, and a quiet protected space to do your sorting?</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Take a moment to reconsider the mentoring conversations you had. Pause and give real consideration to what was said. Often, information that does not initially fit with your belief system gets filtered out. Choose now to be open-minded and consider those ideas, observations, and comments you may have too quickly disregarded. Make notes here on topics that come to mind that you need to consider more closely.</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>Finally, understanding the absolute importance of your decision is a critical piece in driving the sorting process. The cognitive energy you get from focusing on the reasons why this decision is so important will help you remain open minded and process information more efficiently. Write a few sentences on why this decision is so incredibly important to your happiness and well-being.</p> <p>_____</p> <p>_____</p> <p>_____</p>
<p><b>Reticular Activating System</b></p>	<p>Your decision is an inflection point. A change in direction. You are going to have to reprogram your brain as you sort through information. By loading a strong vision into your mind, your subconscious will be more likely to assist you in noticing things in your environment that will support your goal. This applies to the sorting of information also. Write a very specific positive statement about your goal, add images or quotes, and anything else that supports your vision. Place this where you can see it while you are reading and sorting information.</p>

<b>Sort!</b>	Sorting your information is critical to conceiving a plan. Follow the process below to organize your research, digest it, and prepare to integrate it into a plan that will carry you to accomplishment. The DISCIPLINE STRATEGY® book explains the importance of location, state of mind, and method. Once you are ready, you need to determine <b>credibility, detail level, reasonableness, type of information, your enthusiasm, the theme of the information, and the age of the information.</b>
<b>Credibility</b>	Determining credibility can be challenging when a majority of your information comes from Internet searches. Below is a guide to help you grade credibility of your sources. Take each piece of information or research you have and label it with a credibility rating of one to five stars.

Source	LABEL - Credibility Rating (* low to ***** high)	Notes
Official Government Websites	*****	See: : <a href="https://www.usa.gov/federal-agencies/">https://www.usa.gov/federal-agencies/</a>
Library of Congress Selected Sites	*****	see: <a href="http://www.loc.gov/rr/askalib/virtualref.html">http://www.loc.gov/rr/askalib/virtualref.html</a>
Respected Academic Journals	*****	see: <a href="http://www.scimagojr.com/journalrank.php">http://www.scimagojr.com/journalrank.php</a>
News & Magazines	***	Credibility varies. Be sure to verify with multiple sources
Blogs & Opinion Sites	Ranges from * to *****	If you don't know who runs a site, give it a *. If you are very familiar with the author and know them to be a subject matter expert (and can verify this) then give it a *****
Scholarly Material	*****	If the material is from a highly respected journal (see item above) then give it *****. Otherwise look at the number of citations and judge accordingly.
Members Only Sites	Ranges from * to *****	Member only sites can be a wealth of first hand knowledge and experience. But, the information has not been scientifically tested. Spend considerable time verifying information and reading posts. It is possible to find unique and highly informative information on such sites long before it disseminates to a broader market.

<b>Detail level</b>	As you begin to more closely examine the information you have gathered you will realize that many promising articles contain very few details. The titles may be compelling, but the content just isn't detailed enough to be useful. As you are sorting through the material, use the labeling scheme shown below to tag each piece of information.
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LABEL - Detail Level	Description	What to do
None	Typical internet "click bait" type article with a good headline but no relevant content. Any piece of information that provides no useful guidance.	This type of information may have appeared good initially, but if you were not screening during the investigation phase you may have kept it to be considered later. During the sorting process, this information can be disposed of, deleted, or set aside.
Low	Short information pieces or non focused articles that reference your topic and provide something of value.	Some information sources with low levels of detail may still contain nuggets of wisdom or insight. The key is to capture those small bits of detail that may be important. Highlight (electronically or on paper) the key information from these sources. Mark the source as low detail. The valuable information can be extracted and captured on paper or electronically in a master document. The resource can then be archived electronically or set aside.
Medium	More expansive articles, research, or guides that provide a multiple interesting details.	This level of detail begins to give you some key elements that you will need to conceive a plan. These documents should be fully digested, highlighted, and you should create accompanying notes. Keep the original source document along with your notes together.
High	Unusually high level of details with potential full details that may be sufficient to support a plan conception.	This type of document or source is rare. It answers many of your questions, potentially provides a suggested full detailed plan that closely matches what you need, or is a very detailed accounting of a personal success story that is relevant. These documents can be long and require a commitment in time and attention to digest. Make sure you give full consideration to an excellent find like this.

<b>Subjective Measure of Reasonableness</b>	Reasonableness deals with two different concepts. First, certain information or guidance from your research may not be reasonable for you due to personal reasons. Second, some information, after being considered in more depth, you may simply decide is unreasonable. There may be some inherent flaw that you find in the information that leads you to determine that it is not a reasonable approach to reaching your goal.
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<b>LABEL - Subjective Measure of Reasonableness</b>	Description	What to do
Not reasonable	Information that you know with certainty will not work for you or information that you determine, after careful review, does not seem practical in nature.	Some information may be credible and have medium or high level of detail but just isn't reasonable for your situation. This is a very subjective and personal evaluation. So pause and make sure you are open minded before marking something as not reasonable. If you do make this determination, archive the information and give it no further consideration.
Questionable	This type of information is something that you are having difficulty determining if it is reasonable or not. Perhaps it is a new paradigm, suggests something you have never considered. If you just don't know what to think about the content, then mark it as questionable.	Questionable information doesn't need to be archived. It may be a brilliant find with break through insights. However, you don't have a sufficient framework in which to evaluate it. This piece of information needs to be evaluated further by contrasting it with other materials after you complete a full review of all information you have gathered. You will need to revisit this piece of information and later classify it into not reasonable or reasonable.
Reasonable	Information that you determine is reasonable given your life situation. This is information that presents ideas, methods, or plans that you could foresee implementing.	You know your own life's situation better than anyone else. That is why it is important for you to determine if certain information offers a reasonable solution or path to reach your goal. This is an important criterion when evaluating information that you may later choose to act upon.

Opinion, Science, Fact	It is important to distinguish opinion from science and fact. Opinions, whether authoritative or not, can direct you to new findings that are just emerging into the mainstream. Science, while often solid, is typically evolving and must be measured in light of other scientific findings. Facts are indisputable but may have previously been unknown to you.
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LABEL - Opinion, Science, Fact	Description	What to do
Authoritative opinion	An authoritative opinion comes from someone whom you consider an authority on the topic with strong credentials, one for whose opinions you have high regard.	Over time, you will begin to find well respected authorities on certain subjects. Be careful who you give the title of "authority" to, but finding such a source can be extremely valuable. Accept authoritative opinion as solid evidence unless you find contrary information that motivates further research.
Opinion	An opinion is someone's stated belief. But, It can not immediately be backed up with science or fact. If you don't know the source to be an authority, then label it simply as opinion.	Opinions from non authoritative sources may be a good indication of where to dig deeper. Early trends and discoveries often first come to light through individual's personal experience. This experience is then expressed as an opinion. History is filled with stories of someone's opinion (often rejected) that later became the seed of a great discovery.
Science	Science is based on a process that includes testing hypotheses. It is more solid than an opinion because it has been tested and will most likely be challenged by other scientists.	Science is always evolving, so you have to be careful here. You want to look for competing theories and see how other scientists have tested and responded to the information. But, this information is typically solid and can be used to support your plan conception.
Fact	Facts are simply accepted information that the vast majority of people do not debate.	Facts are not debatable. But, you may discover facts you previously were not aware of that have a significant impact on your plan. For example, certain requirements for starting a business, graduating college, enlisting in the Marine Corps.

<b>Boring, Resonates, Exciting</b>	Your emotional response to your research materials provides important clues as to what approach or strategy will be the easiest to maintain in the long run. Emotional energy is a finite resource, you want to find a path to your goal that you are excited about.
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<b>LABEL - Boring, Resonates, Exciting</b>	Description	What to do
Boring	If a particular source document presents information or a strategy for reaching your goal that strikes you as boring, completely uninterested, or something you would rather die than do.	When you conceive a plan for your goal you will need to have a lot of enthusiasm to pursue, conquer, and persevere. If a particular source is boring and non-inspiring, it will not form the basis of a motivating plan. Note this emotional response to this material. Try to understand what components are driving the boring response.
Resonates	Some material just seems to fit with your vision and your personality. Something that resonates with you feels emotionally like something you could embrace.	Material that resonates with you is material that you should pay attention to and determine why it feels like a good fit. Dig in further to these materials and find the commonality between multiple resonating sources.
Exciting	Material that gets you excited typically present a believable path that helps you create an instant vision for how you will reach your goal. Something clicks in you and you think, "I can do this."	This type of material is a critical piece of why you have taken time to research. The excitement level means you see a pathway that generates hope. Be sure to fully study this material and understand the components that are driving your enthusiasm.

**Theme (custom tags)**

Theme tags vary based on the topic. Sample tags on early retirement might include downsizing, living on less, how to save more, best communities. The theme is more specific to your particular context or subject matter. The themes may become evident to you only as you read the material. Take side notes on possible themes, and as you see a trend emerging, you can go back and label the items accordingly. If a young entrepreneur is deciding whether to start a restaurant franchise, several themes might emerge such as startup capital, marketing assistance, training, etc. that pertain to the attractiveness of the many options available to this entrepreneur. In the grid below, create tags, descriptions, and notes to use as you sort information.

Themes	Description	What to do

**Date**

Your topic influences the relevance of the date on a particular piece of information. You may want to assess the relevance of the date of each publication and perhaps create date groupings. The sample tags should be arranged in time segments that make sense for your topic. For example, if you are a Type 2 diabetic and decide that you want to attempt to reverse this condition through lifestyle changes, then material published 30 years ago will be much less helpful than more recent findings. Finding the tipping point in terms of recency a given topic is not always obvious. For medical or technology-related research, I would suggest putting more emphasis on the past five years, because change happens so fast in these fields. Other topics may have relevant information stretching back decades. Below decide on up to five time categories you will utilize.

Date Tag (example: recent)	Definition (example: within past year)

**Do this in a manner that works for you**

All of the information on this worksheet is designed to help you find a way to digest, prioritize, and prepare to utilize the information you found during your research. All of this can be done electronically or by printing everything and labeling with sticky notes. It does not matter HOW you do this. It does matter that you DO THIS! Take the time to turn your research into a working knowledgebase form which you can conceive your plan that will guide you to your goal.