MANAGING ALL THOSE TASKS

BY JAMES LAWRENCE

Introduction

There are three key tools to ordering our lives:
1. Scheduling tool (typically a diary).
2. Task management tool (typically a variety of lists).
3. Information tool (a place to record and retrieve information, typically a variety of 'filing' systems).

This article focuses on how to set up a system for managing tasks.

> 'To a large degree, your productivity depends on identifying and using the best tools for the job and then growing in your skill in deploying them.'
> **TIM CHALLIES**

Principles for Task Management

- There is no one way of doing this: the key is to find a way that works for you, and master it.
- Make sure that whatever system you use for capturing things that need to be done can be with you at all times, so you can quickly and easily record things as they occur.
- Those in leadership roles are likely to use a variety of lists. Don't mix different types of items on one type of list. Try to ensure that each item is on the right list, otherwise a list can become very confusing.
- Try to find a way of making lists that is attractive for you. I chose my App on this basis over other possibilities. I liked the font, layout and colour scheme as well as the functionality. This means it has 'drawing power'. I like using it.

Basic Lists

There are two types of lists that serve everyone well. Those who use their diary as their primary ordering tool may only need these two basic lists (although this will depend on the complexity of their role).

- **Check list** This is the most basic list. Create a check list for anything that you do regularly, contains multiple elements, and requires an eye for detail. For example: funeral checklist; youth weekend checklist; planning a PCC meeting checklist. Time spent working out all the different things you need to do for any repeated event is time well spent, especially if it is novel to you. (For a fascinating read on checklists see Atul Gawande, The Checklist Manifesto).

- **Daily to do list** This list will guide you in your tasks for the day alongside the

> 'Checklists help produce the clarity that produces momentum and checklists reduce the uncertainty that causes friction.'
> **GRAHAM ALLCOTT**

things that are already in your diary. It doesn't have to be very complicated (a post it note may well be sufficient).

A Task Management Structure

If task management is your primary ordering tool, or your role has a significant degree of complexity, your task management is likely to need several layers to it. There are multiple ways of constructing a system, and most productivity writers have a particular way of suggesting we do this. As always, the key is to find a system that works for you and master it.

As a basic structure, there are likely to be five components, the first three are best stored in your task management tool(s), the last two in your information tool:

1. **Project list** A way of recording all the projects that you are working on, in every aspect of your life.
2. **Task list** A way of capturing the actions that need to be taken to deliver both on your projects and also actions that are one-off tasks.
3. **Daily to do list** A way of identifying the things that you are going to do today alongside the items in your diary.
4. **Ideas list** A way of capturing ideas that you don't want to forget but don't involve an action at this time.
5. **Waiting for list** A way of recording that you are waiting for someone else to do something before you can determine or take your next action.

All these components are lists, and that is why it can be a bit confusing. If we're not careful we either place items on the wrong list, or we store the lists in the wrong place. These five lists differ in both type and where they are best stored. For more on each see below.

1. Project List

A project can be defined in a number of ways. A common definition is any task that requires two or more steps to complete. However, this may not be the most helpful definition as it would mean on your projects list you will have significant large pieces of work alongside relatively small and simple pieces of work. For example, build an extension on the house may sit next to replace ink cartridge (which technically requires two steps to complete i.e. buy cartridge, put cartridge in the printer). Perhaps a better definition for project is 'any significant initiative (complex and important) that produces a particular result and has an end point'.

Here are a few tips for creating your projects list:
- Identify a small number of categories for your projects. For example: personal, work, family, church, home, social. This helps when reviewing projects to be able to consider ones in a particular category.
- Try to name a project in a way that reflects a measure of what a successful outcome might be. For example: Messy Church might be 'Messy Church with 12 new families attending.' This helps give clarity about the focus, the why of the project.
- Be careful not to add 'information' to your projects list unless they can be stored as linked files – information is best stored in your information tool.

2. Task List

This is a list of actions that need to be taken. There are broadly two types of tasks:
- Those related to projects that will progress the project towards completion.
- Those that are 'one-off' tasks, that stand alone from a project. For example: buy printer cartridge, or email N recommended booklist on mentoring.

1. PROJECT RELATED TASKS

Each project will have a list of actions that need to be done to complete the project. More complex projects may have 'subprojects' that need to be completed to get the overall project done. Where you record these tasks will depend on the system you choose.

Some systems enable you to store the tasks with the project. For example in the Todoist App you can structure it so that there are categories, then projects within the categories, and then tasks to complete the

project within the project folder (even subdividing these into subsets if you want).

Others chose to have a project list and alongside it a 'master actions list' that comprises of all the actions needed to complete all the projects. The actions might be listed under context, time, energy or priority (or a combination of these) to give you an indication of where they need to be done, how long they might take, how much energy they require, and how important they are.

2. ONE-OFF TASKS

These are the sort of things that may arise during a meeting as an action point from that meeting, or come to mind when we are praying, driving the car, walking down the street, in the shower, or having lunch. We don't want to (or can't!) do them there and then, but we do want to record them because they need to be done.

Critical to the capturing of these tasks is having a system we use that is always with us, can be quickly accessed, and then can be easily reviewed as part of our weekly/daily review.

For many years I always carried a small pad of post-it notes and a pen with me wherever I went (in fact I had multiple post-it pads and pens located in all the different places I was likely to need them — jacket/coat pockets, car, desk, bags and so on). Whenever anything occurred that was a task to be done, I wrote it on a post-it note there and then. More recently I have started using the Todoist App to capture these things. It has the advantage of being accessible on all platforms, and tasks can be entered by writing or voice.

TIPS FOR ADDING YOUR TASKS

Some people like to have a single task list combining both project related tasks and one-off tasks. Others like to have two separate lists, one related to projects, and one for one-offs.

When adding items to your task list ensure you write them as an action, not information. Each action ideally describes exactly what you need to do. Clarity here makes a big difference, as it ensures you know exactly what has to be done when you look at your to do list. Two things can help gain this level of clarity.

- Use the structure of verb, subject, object.
- Try to picture yourself doing the action, something physical that involves an action. For example 'follow up N about the report.' becomes 'Call: N to finalise report.'

For some it may help to nuance your list by either placing them in distinct categories (as described above, context, time, energy, priority), or by placing these things at the end of the task:

- **The energy level requited to do the action** Through the day our energy fluctuates from high to low and this impacts our ability to focus. Simply writing next to the item on our to do list whether it is a high (H), medium (M) or low (L) energy task can guide us as to when is the best time to do that task in the day.
- **The time you think it will take to do it** Some items on the list may be very quick (5 minutes), others may take substantial amounts of time (60 minutes).
- **The importance of the task** It may help to grade the importance, either using a scale (for example 1-5) or a colour scheme (this can often be done in Apps using a priority grading system).
- **The drain level of the task** Some tasks energise us, some drain us, so you can also add another letter to indicate the impact of doing the task on you: E for Energise, N for Neutral and D for Drain. This enables you to place draining tasks in between energising tasks.

For example 'H/30/1/E' might indicate high energy level for a task taking 30 minutes, which is high priority and brings you energy. This can help you work out what to do when i.e. if you have 30 minutes available when your energy level is medium you can look at your list and decide to do two 15 minute tasks (ideally of a similar type) requiring medium energy level.

TIPS FOR MANAGING YOUR TASKS

At some point each day (preferably at the same time each day) process all your new tasks. Whether you are using a paper or electronic format for capturing the tasks, consider each one and decide to:

- **Delete** If it actually doesn't need to be done.
- **Do** If it can be done in a few minutes, do it as it may take longer to process it into your task management system than actually doing it.
- **Delegate** Pass it on to someone else who needs to do it.
- **Defer** Place it into your task management system (or diary) so that when you do your weekly/daily review it will be there to remind you of what needs to be done.

Using a task management approach to ordering our lives will require a regular check in with our lists. This is normally done on a weekly and daily basis.

- **Weekly review** You will need to look at your project list and task list to plan your work for the week, taking into account (a) how much space you have given your diary commitments for that week and (b)

your larger goals for that season of time you are in (these are discerned through a wider process).

- **Daily review** This enables you to plan what you are going to do today. It doesn't take long, but does ensure (a) you are clear about your actions for the day ahead, (b) you identify when is the best time to do them (according to complexity of task, personal resistance to doing it, and the level of focus you need to do it), and (c) how they will fit in with existing diary commitments for that day.

3. Daily To Do List

Your daily to do list helps shape how you use your day. We've written a separate guide on Top Tips for Daily To Do Lists which will be circulated in next month's Lead On.

'No approach to organising your lists will work if you do not regularly review those lists.'
MATT PERMAN

4. Ideas List

These lists capture thoughts you have about things but aren't necessarily going to action. They don't go into your task management system but into your information system, where you can quickly locate them and retrieve the information when you want it. For example, birthday present list for spouse; items to purchase when in town; home improvement ideas; things to talk with a colleague about.

5. Waiting for List

This is a list where you record all the actions you are waiting for others to complete, which when done will enable you to progress your next action. Again, this is a list that is kept in your information system (Evernote or Onenote are both good for this).

Master Your Task Management

Ultimately it will be for you to design a process of managing your tasks that works well for you, and then master it. Taking time to do this is time well spent, and then perhaps once a year review it in the light of experience and new insights and ideas you may have gained from elsewhere to improve it.

SUGGESTED APPS

Todoist Across platform task management App. Can create category, project, task, subsets within tasks. Can sort by date, by priority. Can't add notes in free version. Excellent App for complex list handling.

Swipes Multi platform and web based task management App. No categories, can date, assign a label, add notes. Great for simple to do list.

Asana Ideal for cross team project planning. Multi-platform. Can assign tasks to others, add notes, create sub sets in projects.