The Master Task Success System

Developed by Mike Scott Enterprises, Inc.

Using Microsoft Outlook 2003

to Store, Plan, Track, and Accomplish Tasks and Projects

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General Concepts regarding using the Master Task System

Tasks, Projects and Total Accountability

The difference between tasks, appointments, and projects

- A task is single activity that may or may not have a due date on it.
- An appointment is an activity that has a date, a start time, an end time, an agenda, and a stated purpose.
- A project is a series of planned out deliverables and tasks with a due date and a goal.
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Characteristics of the Information Transfer Form (ITF)

- The Information Transfer Form (ITF) is designed to keep track of random thoughts you have during meetings or when you are concentrating on completing a project. These random thoughts are unrelated to what you are working on at the moment. This allows you to keep track of them and not forget them.
- Print the ITF on both sides of the paper. Information written on blank sides of paper tends to get lost.

General guidelines for the Master Task Success System

- The Information Transfer Form can be downloaded in paper format from the website www.totallyaccountable.com.
- When printing the ITF form, print it on both sides of the paper. The is “green” and cuts down on losing information on the blank back-side of paper.
- A copy of the Information Transfer Form should be brought to all meetings to keep

track of all thoughts, unrelated to the meeting, that come to you during the meeting. These tasks get entered into the Information Transfer Form as soon as possible, unless completed.

- Tasks should be written down and should be entered into the Information Transfer Form as soon as you think of them.
- If there is a deadline date for the task to be done, that should be written with the task itself.
- Put any tasks delegated via an e-mail into the Information Transfer Form as soon as possible.
- Do not write on the back of a piece of paper that was not intended to be written on. The Information Transfer Form should be printed on both sides of the paper.
- Tasks should never be rewritten unless there is a good reason to do so.
- Tasks are not appointments. Tasks should never go on a calendar or in a calendar section. This eliminates having to move a task in a calendar if it was not completed.
- Create a recurring SPA appointment at the end of each business day.
- All employees, who have discretionary control over their time, should utilize this Master Task Success System.

Guidelines for Writing Tasks

Using Electronic devices

During the day, when you are not working concentrated on a project or in a meeting where you would use the ITF, enter tasks and projects into your smart phone immediately

Write all tasks beginning with a verb: These verbs can group tasks of a like nature together, for more efficiency. The verbs help you to remember the action you were going to take. Suggested verbs are:

Call
Use this verb when you plan to call someone and it is not an appointment. Be sure to include 1) the name of the person, 2) the phone number, even if you know it, and 3) the subject.

Get
Use this verb to group tasks that are not Calls, Gos, emails, or Sends. Use "Get the Jones report prepared" rather than "Prepare the Jones report." Use "Get working on the building project" rather than "Work on building project," or "Finish the building project."

Go
Use this verb when you are physically going somewhere. This way you can view all of your tasks that need to be done, when you are *going* somewhere, to see if there are any other *Go* tasks you can accomplish at the same time.

Send

Use this verb when you have something to physically send to someone.

Email

Use this verb for tasks to send emails.

The Columns on the Information Transfer Form

B/P stands for Business / Personal. The letter "B" or "P" is placed in the cell for each activity listed.

P? stands for Priority. The letter "S" "F" or "N" is placed in the cell for each activity listed. (See below)

D stands for Delegated. The name of the person delegated to is placed in the cell for each delegated activity.

Tasks, Projects, Thoughts, Ideas, Requests, Delegates list of all tasks and projects

Due Date/Time Give and get specific dates and times for completion of work.

Prioritization of Tasks

This system provides for consistency and a common language throughout an organization for prioritization of tasks. Every task has a priority no matter how large or small, important or unimportant. The system avoids prioritizing based on emotion. It uses logic instead. It also ties into the categorization systems of most task management programs and apps

The Prioritization words, letters, and meaning

This information is also written on the top of the Information Transfer Form.

(S) Date Specific

A task with a priority of Date Specific (S) means that this task has a due date on it and the action date is the same as the due date. This date is the only date for this task to be done. They need to be constantly reviewed to ensure nothing on this list gets missed.

(F) Date Flexible

A task with the priority of Date Flexible (F) means this task has a completion date that is somewhere in the future. Therefore when it is done is flexible as long as it is before the completion date. Sometimes it is a task that supports a project that has an unchangeable completion date and time. These tasks also need to be constantly reviewed to ensure they don't inadvertently become a Date Specific (S) at the last minute because of procrastination.

(N) Date None

A task with the priority Date None (N) means this task has no completion date on it at all. It also means that there are no negative consequences if it is not completed. They are the tasks that you might want to get done sometime, but you have no specific or flexible dates to get them done.

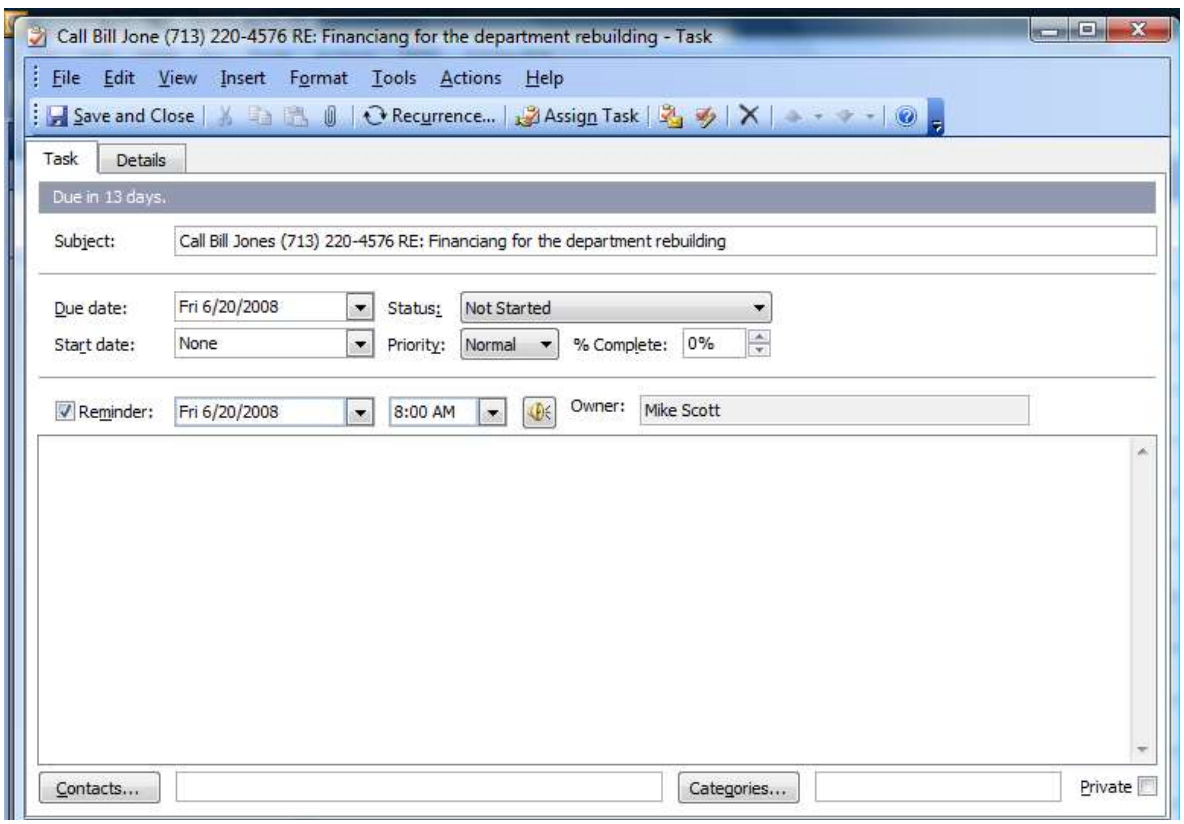
Most often, if you don't get to your Date None (N) tasks there are no negative results. You should review them every now and then to see if you want to move any of them to a Date Flexible (F) priority.

Using Electronic Systems to Manage Priorities

Electronic systems, such as Microsoft Outlook 2003, provide simple, yet powerful methods of storing, sorting, comparing, searching, *never forgetting* and prioritizing all tasks. All tasks, stored in one system, can be conveniently reviewed in any way desired.

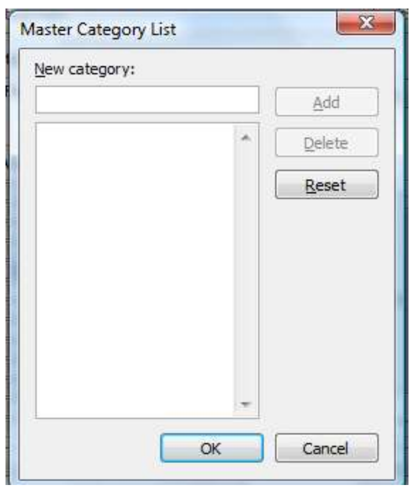
Guidelines for using Microsoft Outlook 2003

- Open Microsoft Outlook and click on the Tasks button.
- Click on File, click on New, click on Task – an Untitled Task window appears.
- In the Untitled Task box enter a task on the subject line.
- Go down to Due Date if the task is a Date Specific (S) or a Date Flexible (F).
- Click on the down arrow of Due Date and enter the appropriate date.
- Go down to reminder only if the task is a Date Specific (S).
- If the task is a Date Specific (S).check the Reminder box and enter a date. Put reminder dates only on Date Specific (S) tasks and appointments.



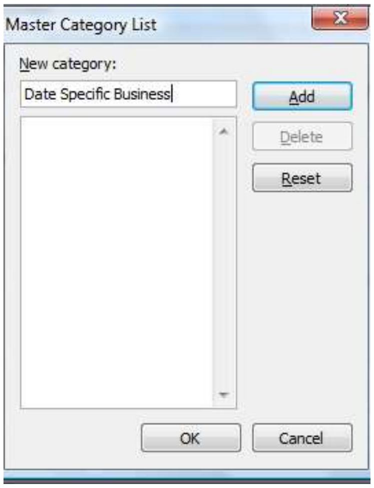
- Go to the bottom right corner of the box to the Categories button.

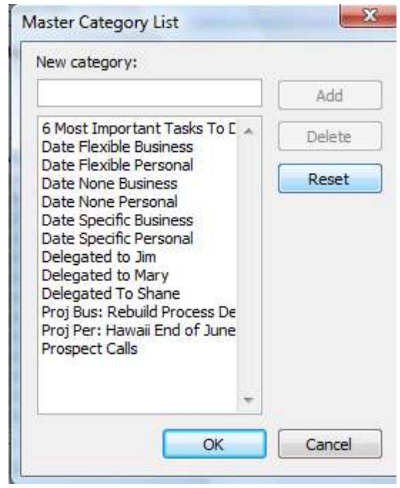
- On the Categories box that appeared click on the Master Category List button.
- Click on each of, or highlight each of the categories you do not currently use. The Delete button will become active. Click on the Delete. Button.
- Each category you highlighted will disappear.



- In the areas named New category, put in the following new 6 Core Categories and other categories you need. With each new category you enter click Add

✔ Date Specific Business	✔ Date Specific Personal
✔ Date Flexible Business	✔ Date Flexible Personal
✔ Date None Business	✔ Date None Personal





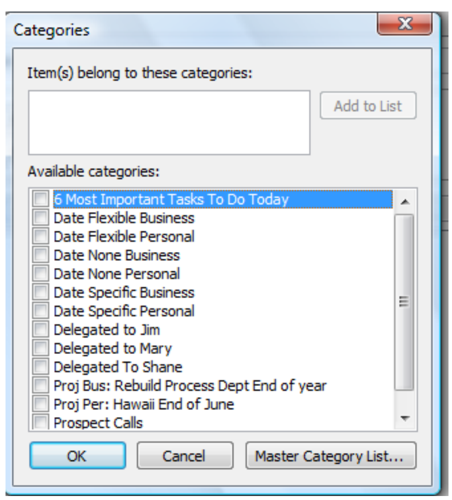
In addition to the core categories add the following:

✔ Delegated to and the name of person(s) you delegate to
✔ Project Bus: Name of project. (Business project)
✔ Project Per: Name of project. (Personal project)
✔ 6 Most Important Tasks To Do Today

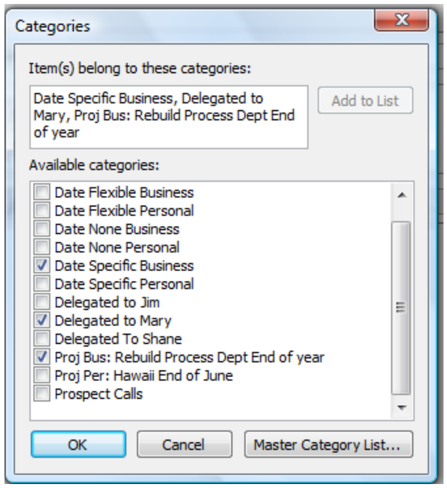
Category Check Boxes

When you have finished entering the categories you want to use, click OK. A box will appear with the new and the old categories in it. Click OK again to clear out the old categories.

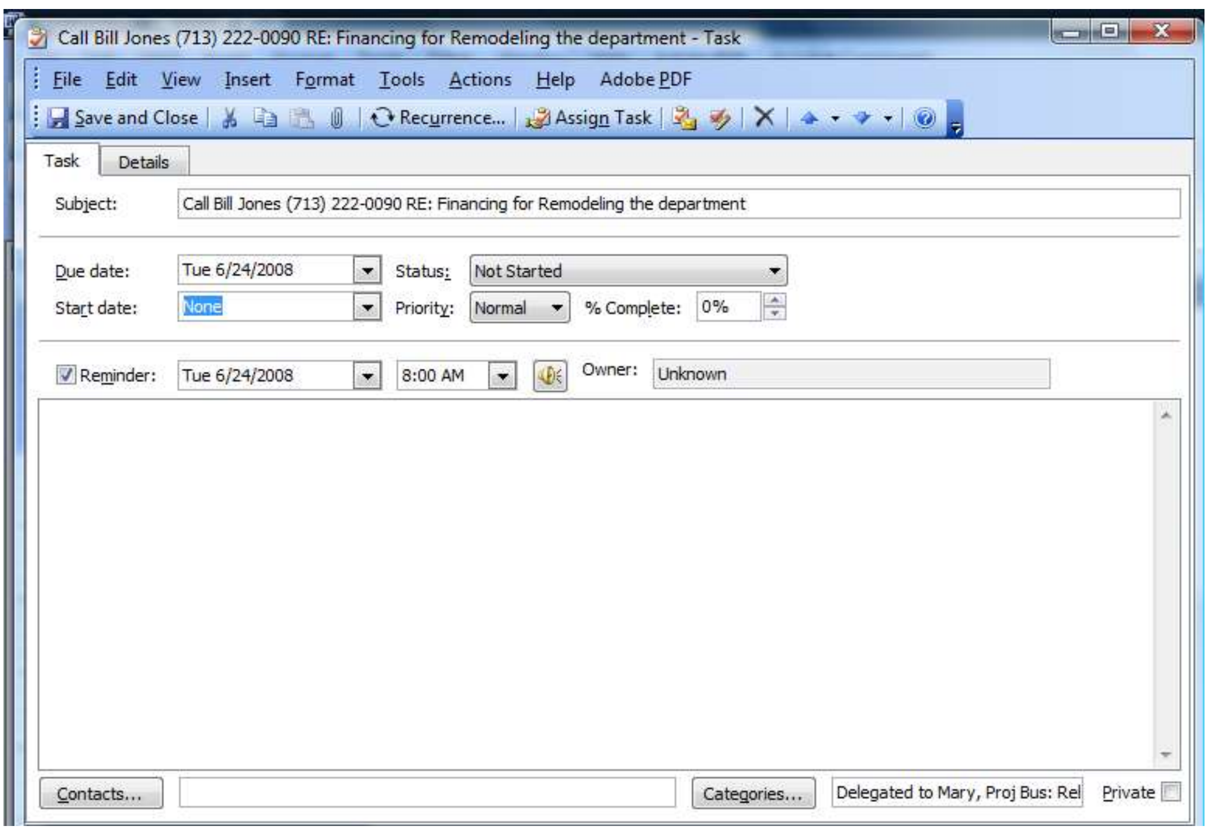
Click Edit at the top of the screen. From the drop down menu click Categories and the following box will appear. You now see only the categories you want to use.



Check the category boxes that are appropriate for this task and they will each appear in the blank box at the top named "Item(s) belong to these categories:



Click OK and the following screen reappears. The categories checked appear in the Categories window in the bottom right corner of the Task window.



Click Save and Close.
Enter in all of your tasks with appropriate information.

To assign a task to someone through your server

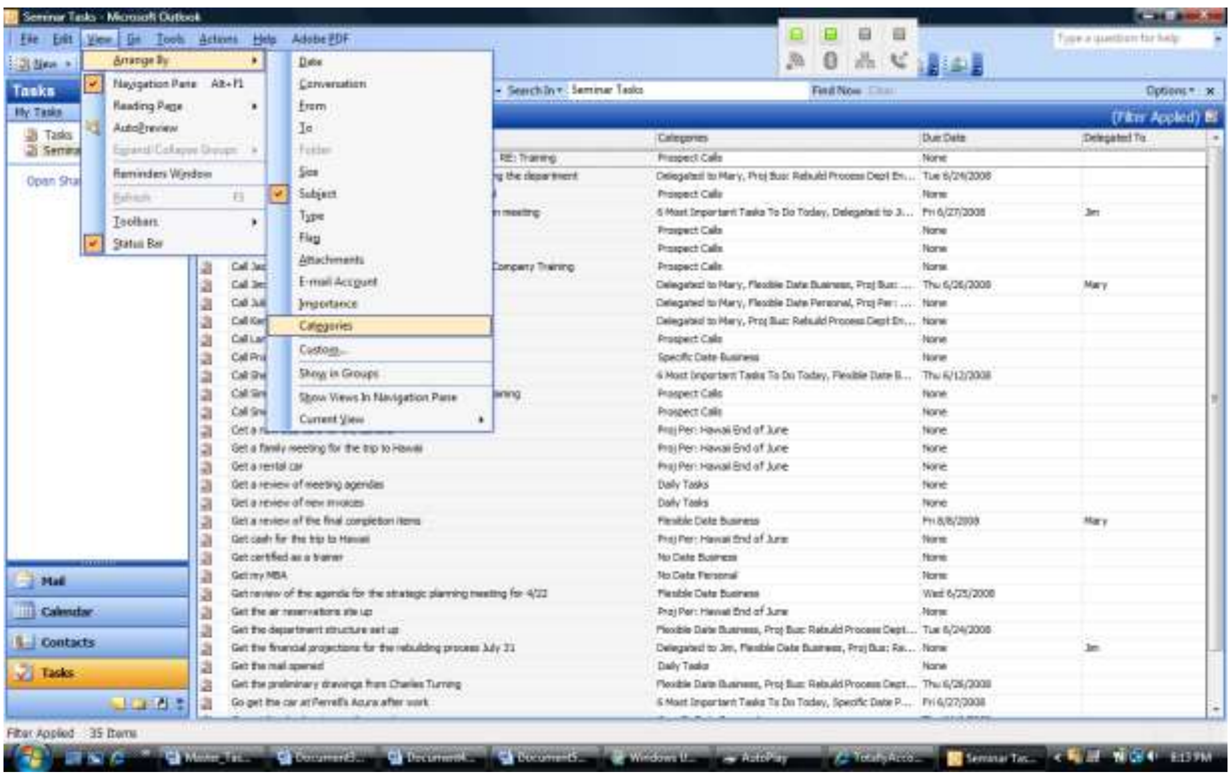
Create the task as you would for yourself. Then click on the Assign Task button at the top of the task window. Then send the task just as you would send an email.

When the person receives the assigned task, they have a choice whether to accept or not accept it.

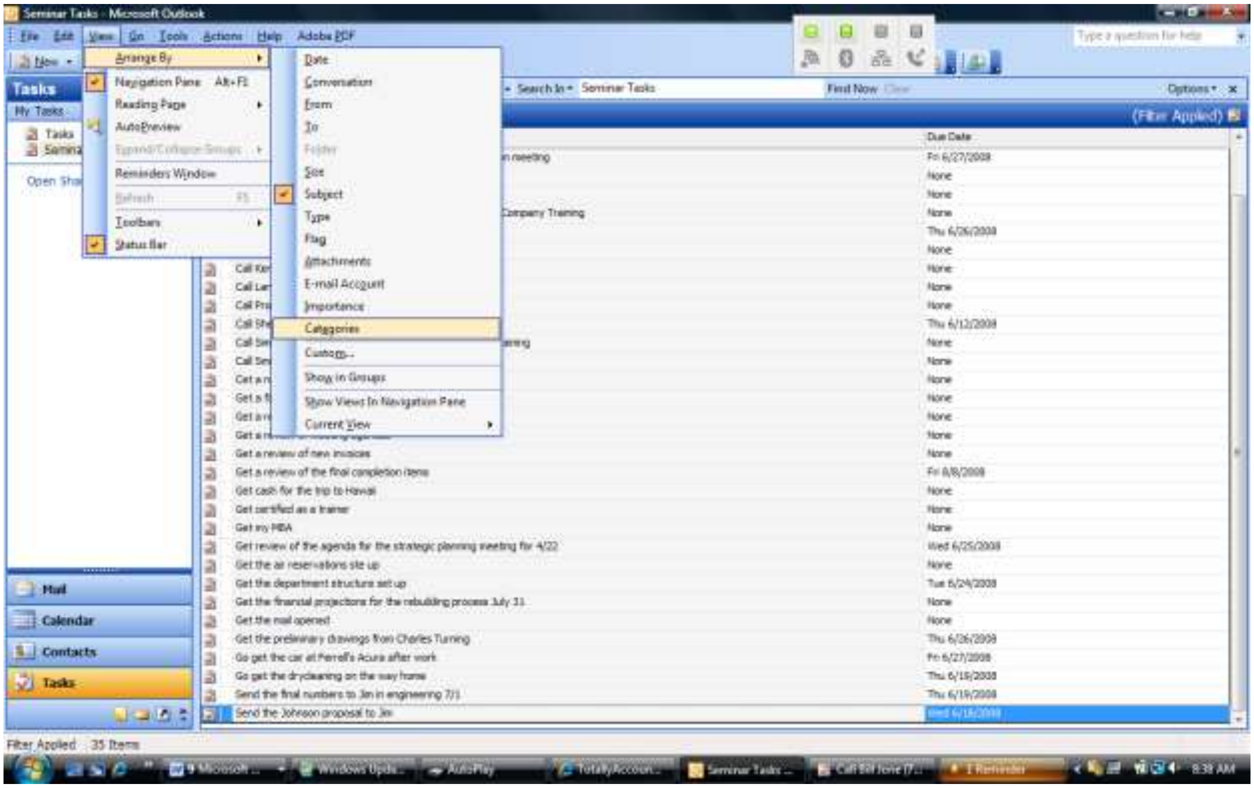
When they accept the task, it is automatically put into their task list. You can keep a copy of the task in your system (recommended) for follow-up. You should also check the "Delegated to" box in your category list so you can track tasks delegated to specific people in your 1-2-1 meetings...

Viewing tasks within the categories created

To see your tasks sorted by the categories you just created, click on the button named View, then move the cursor to Arrange By and you will see the following drop down window.

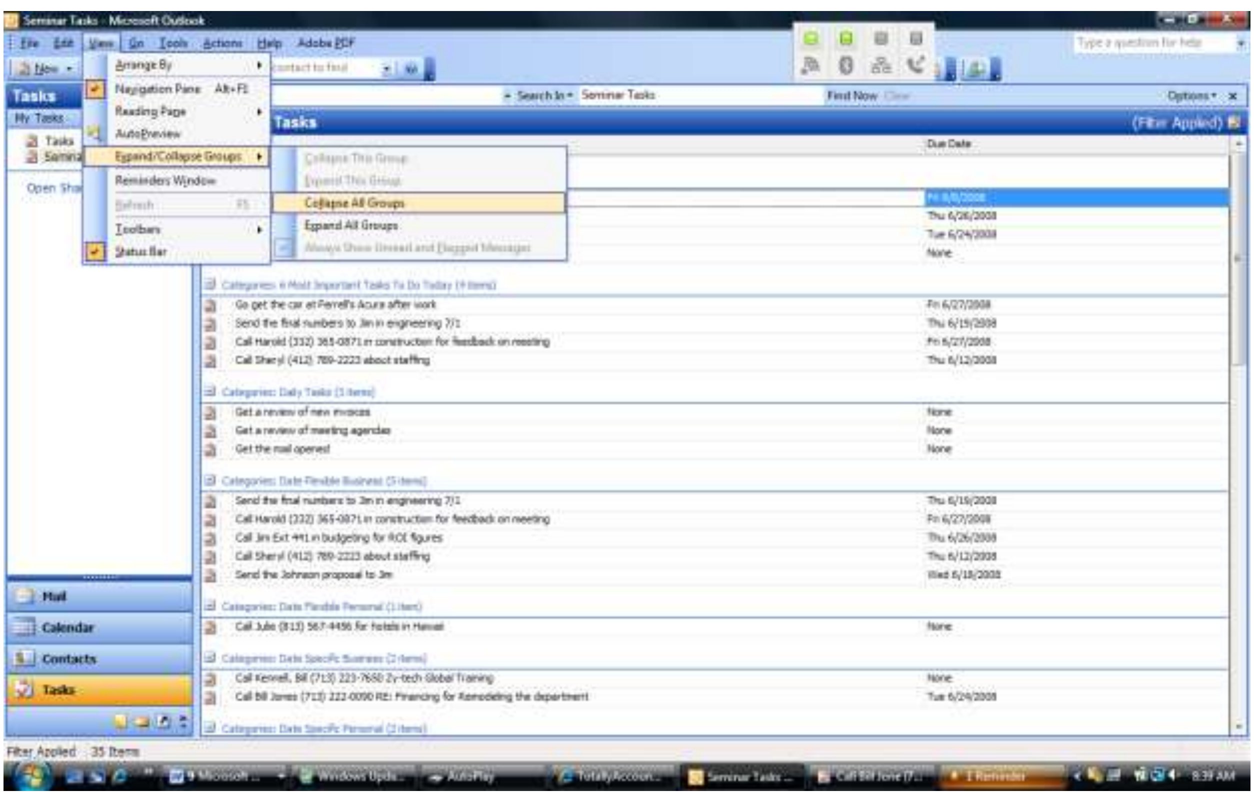


Select Categories from the drop down list and the following window appears.

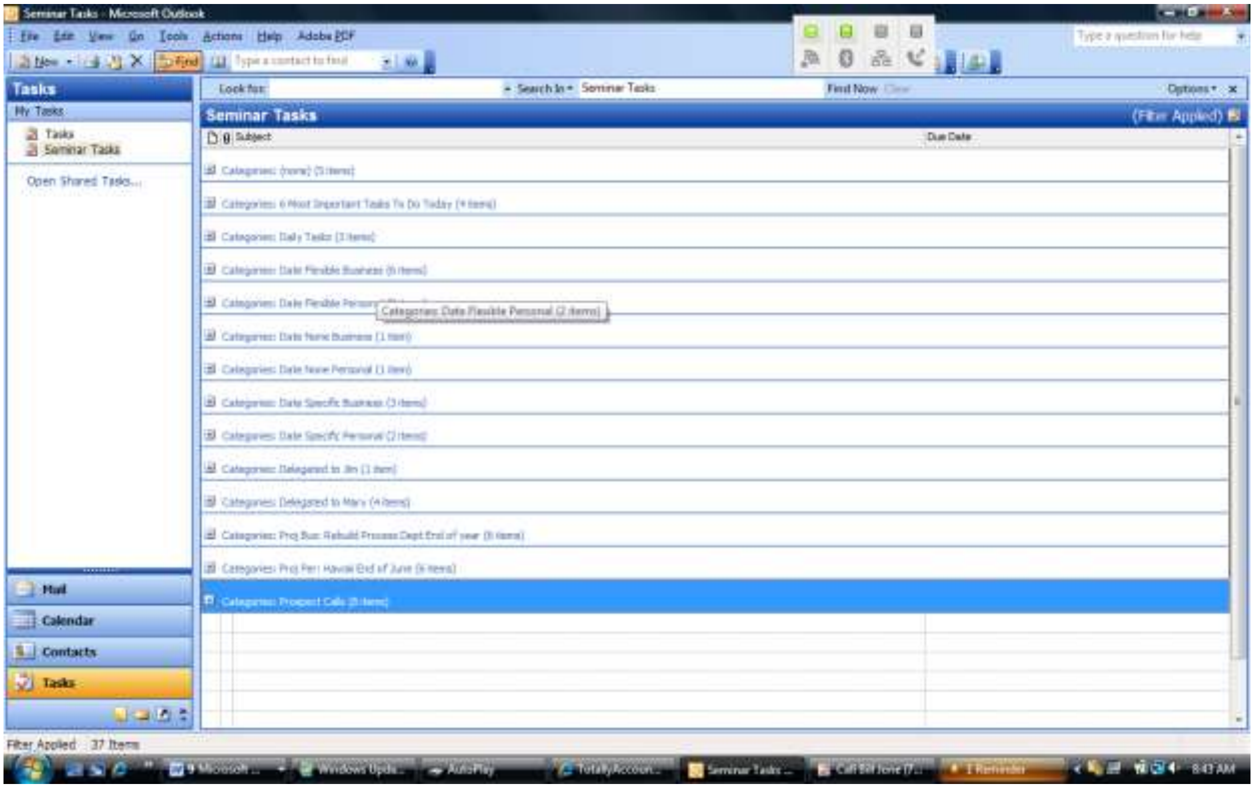


Viewing only the individual categories you created without the tasks showing

To see just the categories you created, without any of the tasks showing, click on the View button, then move the cursor to Arrange By, move the cursor to Expand/Collapse Groups

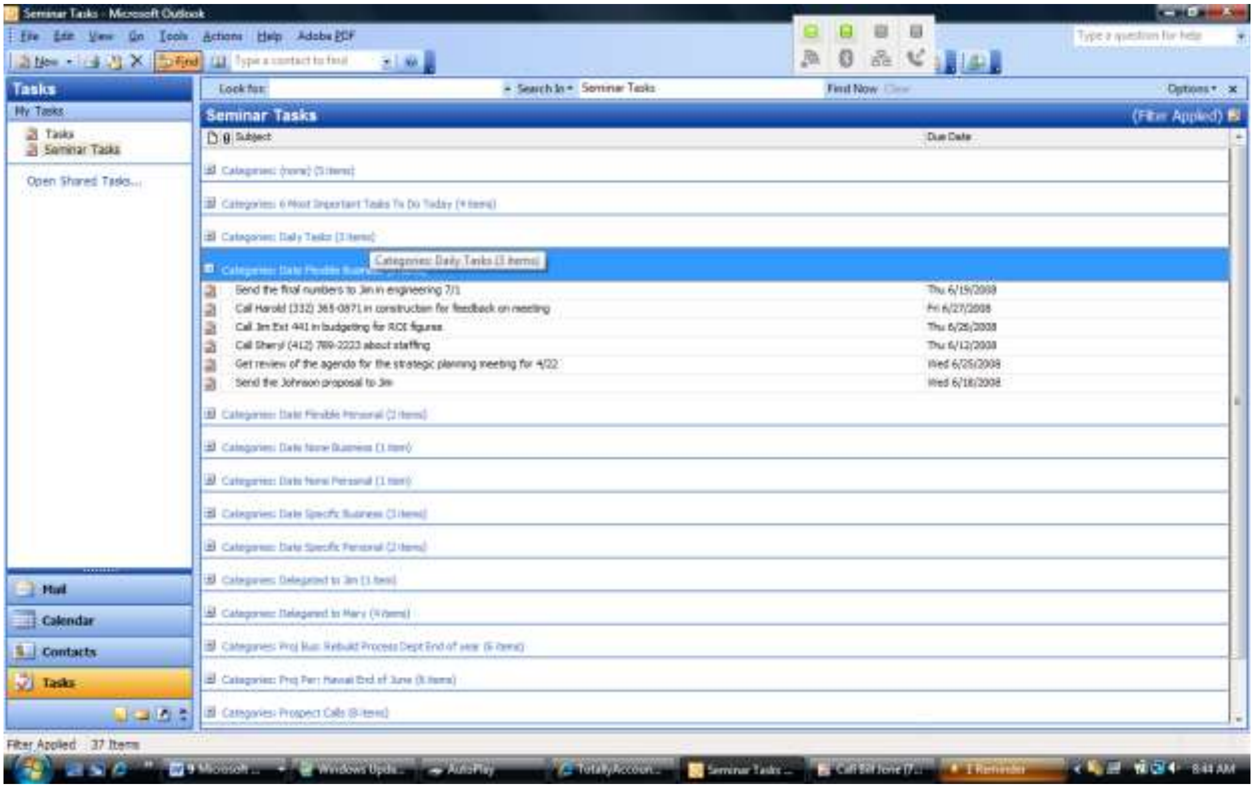


Click the word Collapse All Groups. Now you only see the categories you created.



Different ways to review the Master Task List

Review by Date Specific Business category open. Click the + sign on the category name and the category will open to show the tasks in that category



To sort the categorized tasks by Due Date, take the following actions:

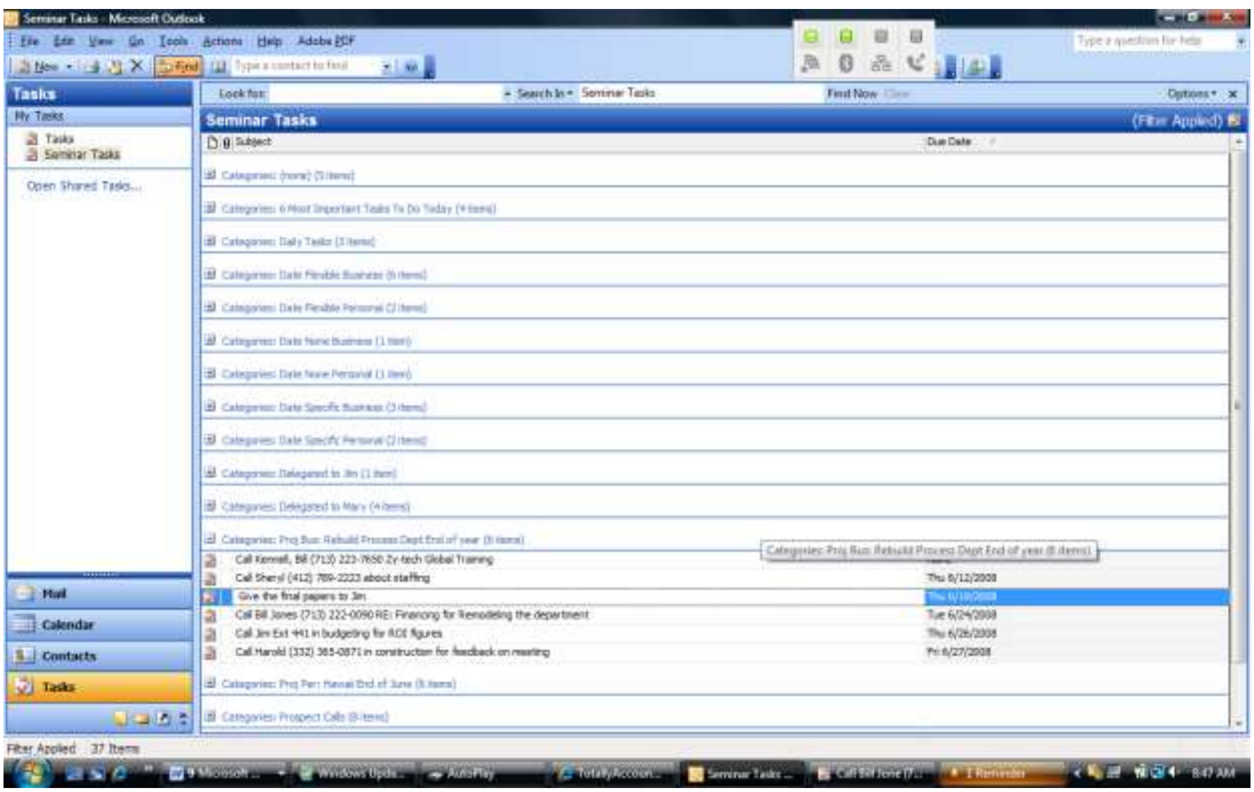
With the tasks in their categories:
Click View,
Click Arrange By,
Click Current View,
Click Customize Current View,
Click Group By,
Click the down arrow in Sort Items by,
Click Due Date,
Click Ascending,
Click OK,
Click OK.

Your tasks, when arranged by categories, will now be sorted by due date, with the soonest date showing first. They will stay this way only until you change this category set up.

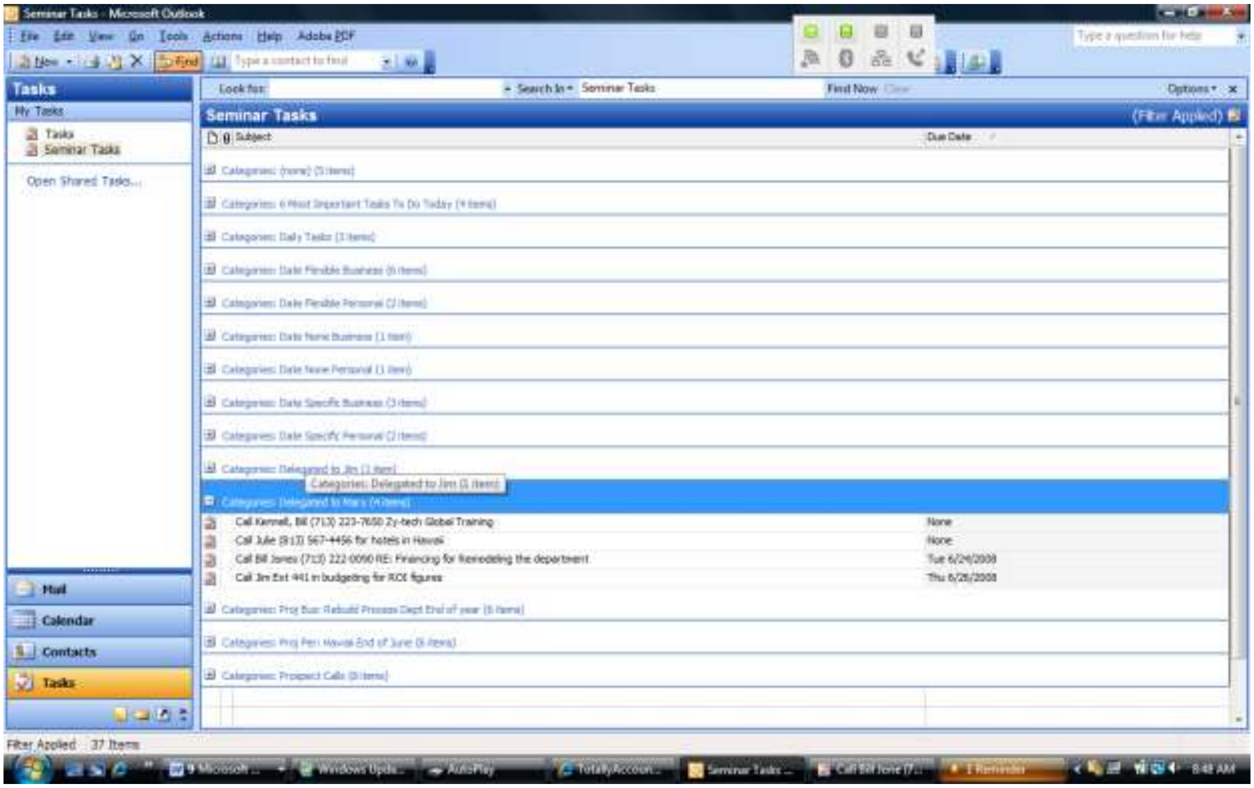
When you leave the category view and then return to category view, you will again have to re-sort the tasks by due date, as shown above

That is just the way it is in Microsoft Outlook 2003.

Review tasks with the project categories open



Review task with a “Delegated to” category open



General guidelines for using Microsoft Outlook

- Put only appointments in the Calendar section. Put only appointments there.
- Put reminders only on Date Specific tasks (S) and appointments
- Use Outlook and the only location for tasks.
- Copy and paste, or drag, any tasks delegated via e-mail, into your Task Section of Outlook. Create a task out of it with the correct subject. It will also stay as an email, as well.