The Master Task Success System

Developed by Mike Scott Enterprises, Inc.

<u>Using Microsoft Outlook 2010</u>

to Store, Plan, Track and Accomplish Tasks and Projects

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.
-

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.

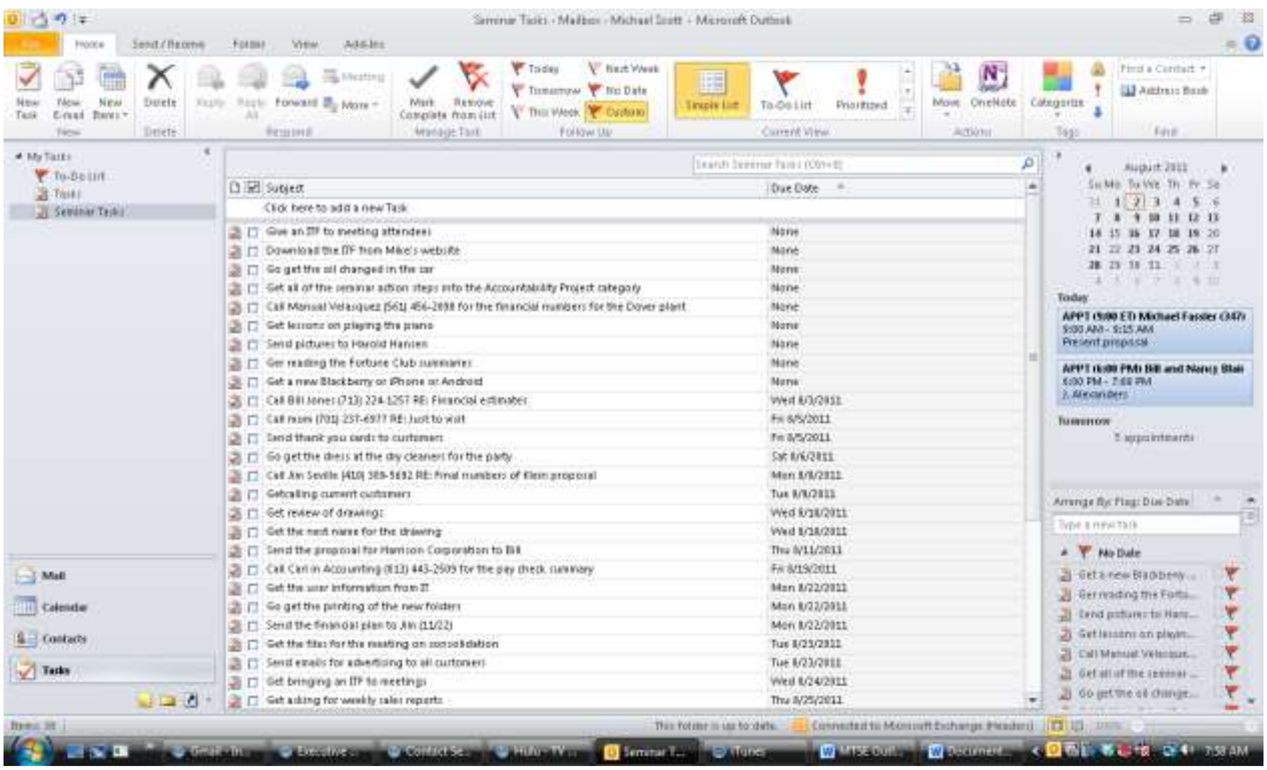
Guidelines for Using Microsoft Outlook 2010 for Storing, Tracking, and Competing All Work

Using Electronic Systems to Manage All of the Work

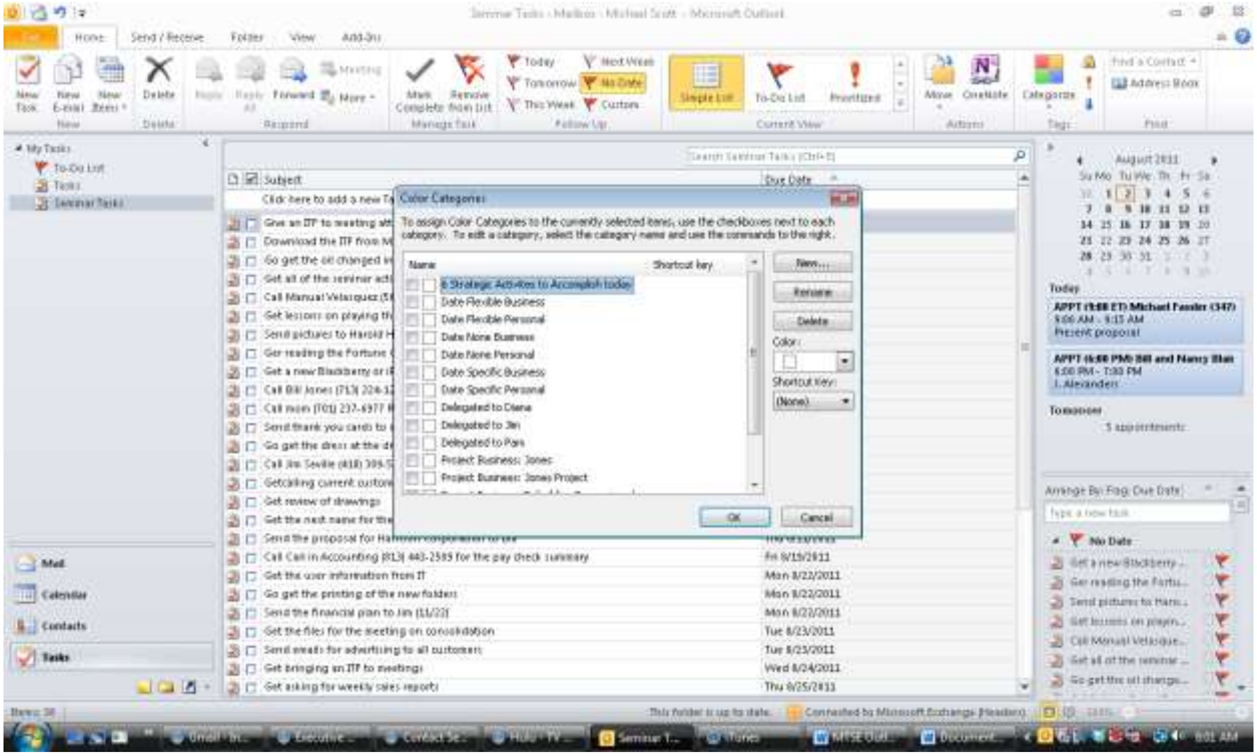
Electronic systems, such as Microsoft Outlook 2010, provides simple, yet powerful methods of storing, sorting, comparing, searching, *never forgetting* and prioritizing all tasks. All tasks, stored in one system, can be conveniently reviewed in any way desired.

Guidelines for using Microsoft Outlook 2010

- Open Microsoft Outlook 2010 and click on the Tasks button. You may not have any in there yet. You may have old tasks that have lost their relevance. Keep any task you want.



At the top of the window you will see a four-colored square named Categorize. Click on this square. When the window appears, click on All Categories. Then you can put in the categories listed below



- Put in the 6 Core Categories and other categories you need.

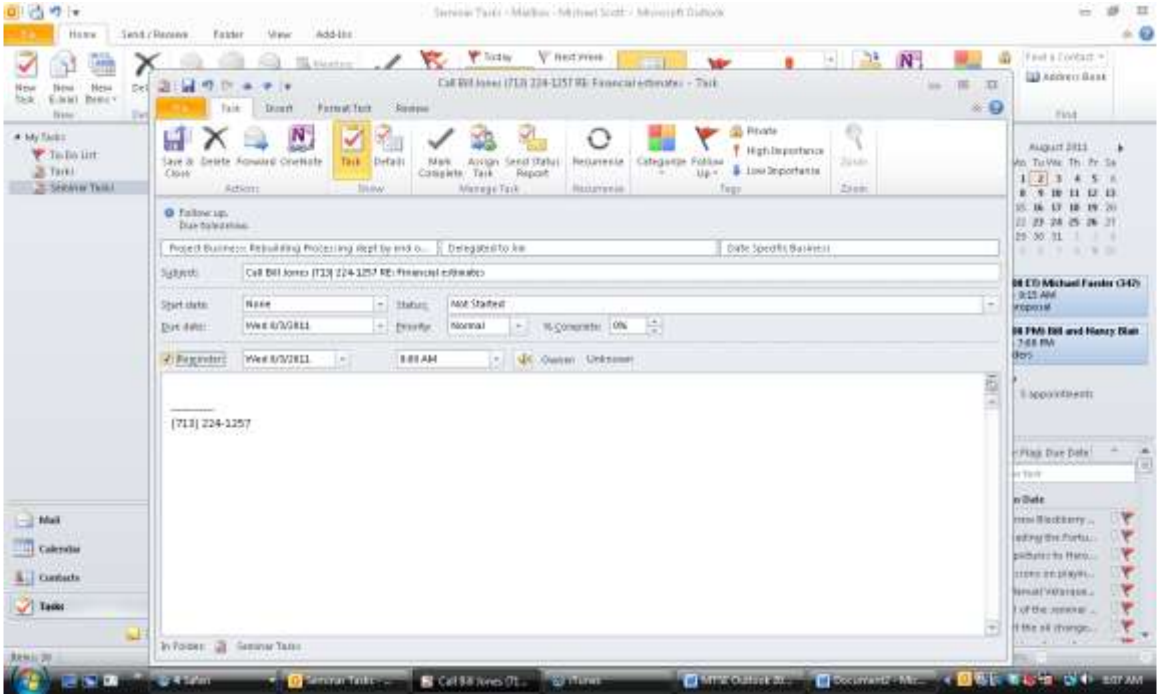
✔ Date Specific Business	✔ Date Specific Personal
✔ Date Flexible Business	✔ Date Flexible Personal
✔ Date None Business	✔ Date None Personal

In addition to the core categories add the following:

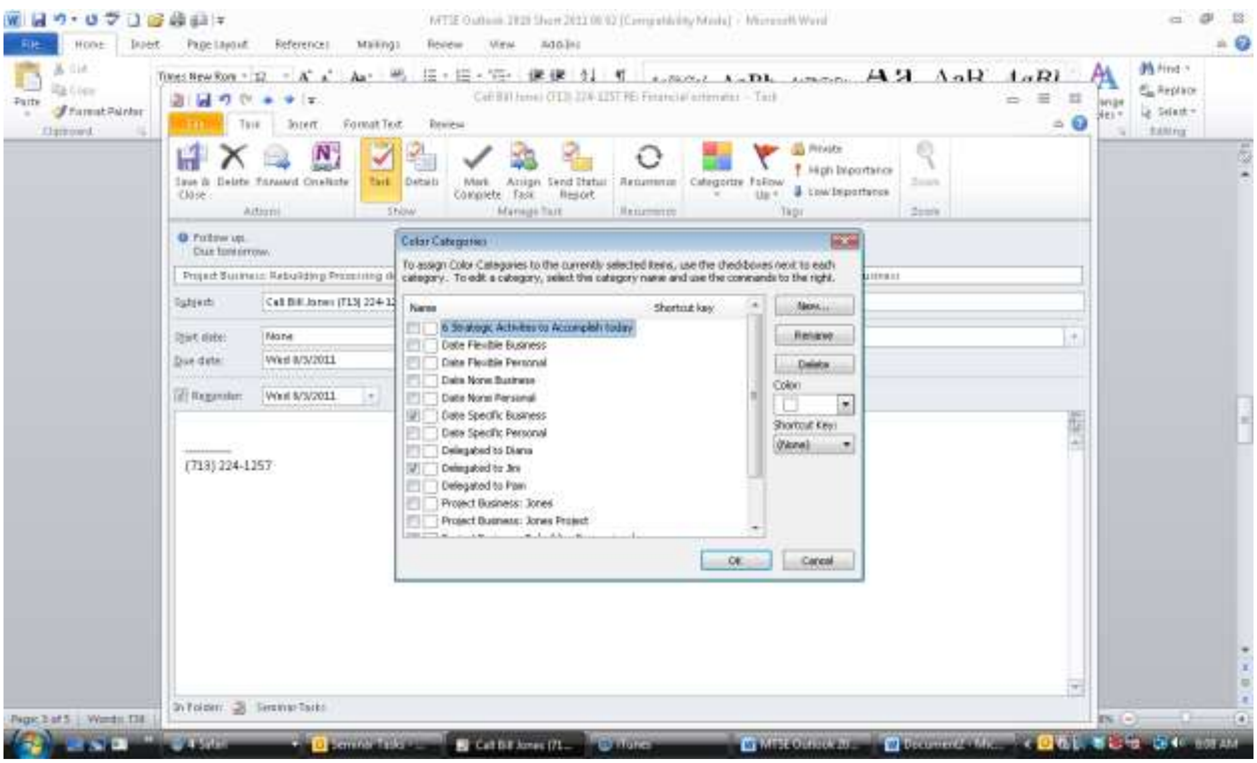
✔ Delegated to and the name of person(s) you delegate to
✔ Project Bus: Name of project. (Business project)
✔ Project Per: Name of project. (Personal project)
✔ 6 Strategic Activities To Do Today

- Click OK when you are complete with entering categories

  - Click on New Task – an Untitled Task window appears.
  - In the Untitled Task box enter a task on the subject line. Example: Call Bill Jones (713) 224-1987 about financial backing.
  - 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.



- Click on the Categorize box at the top of that window, click All Categories, and then enter checks into the category boxes you desire for this task.



When you have finished checking the categories you want to use, click OK.

Click Save and Close.

Leave the priority on *all* tasks as Normal for all tasks. Your tasks will be prioritized by the categories you just created.

To assign a task to someone through your server

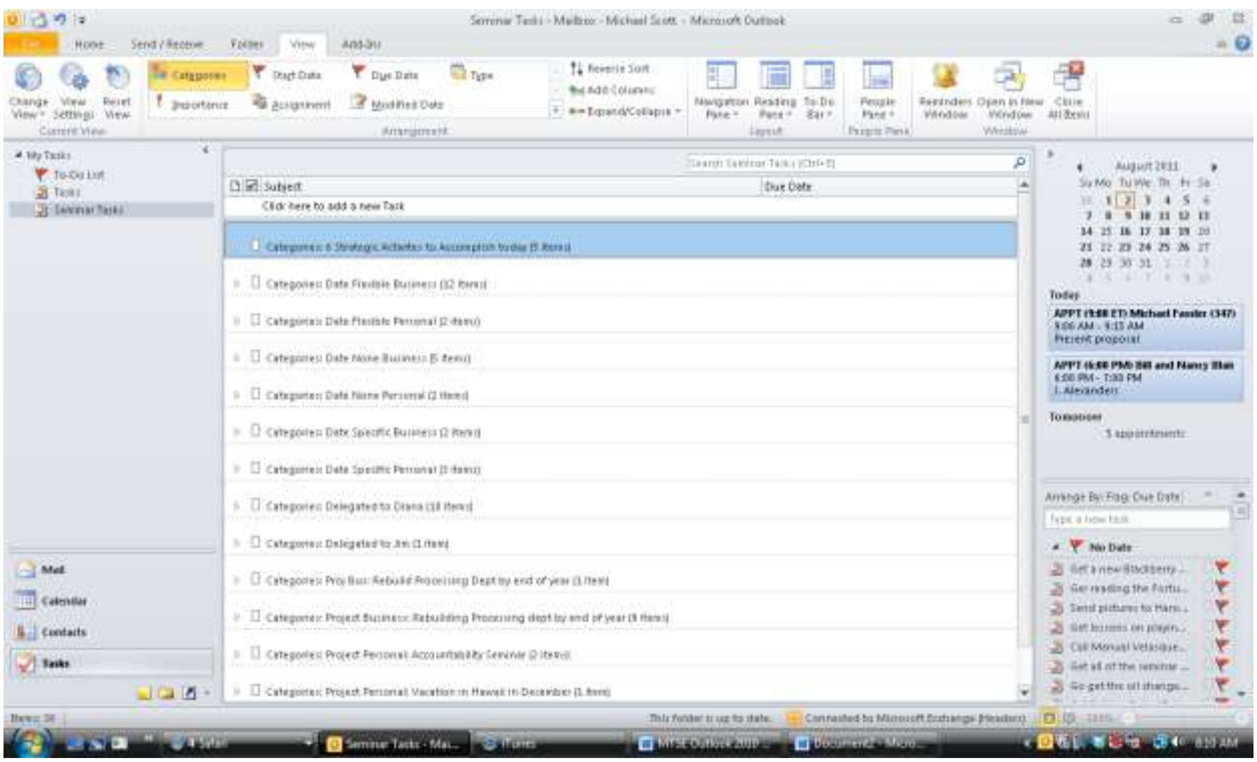
Create the task as you would for yourself. Then click on the Assign Task button at the top of the task window. Then send the task just as you would send an email.

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. It is important that there is exact uniformity throughout the company on Category titles. 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 the Categories created without looking at all of the tasks, which can be overwhelming

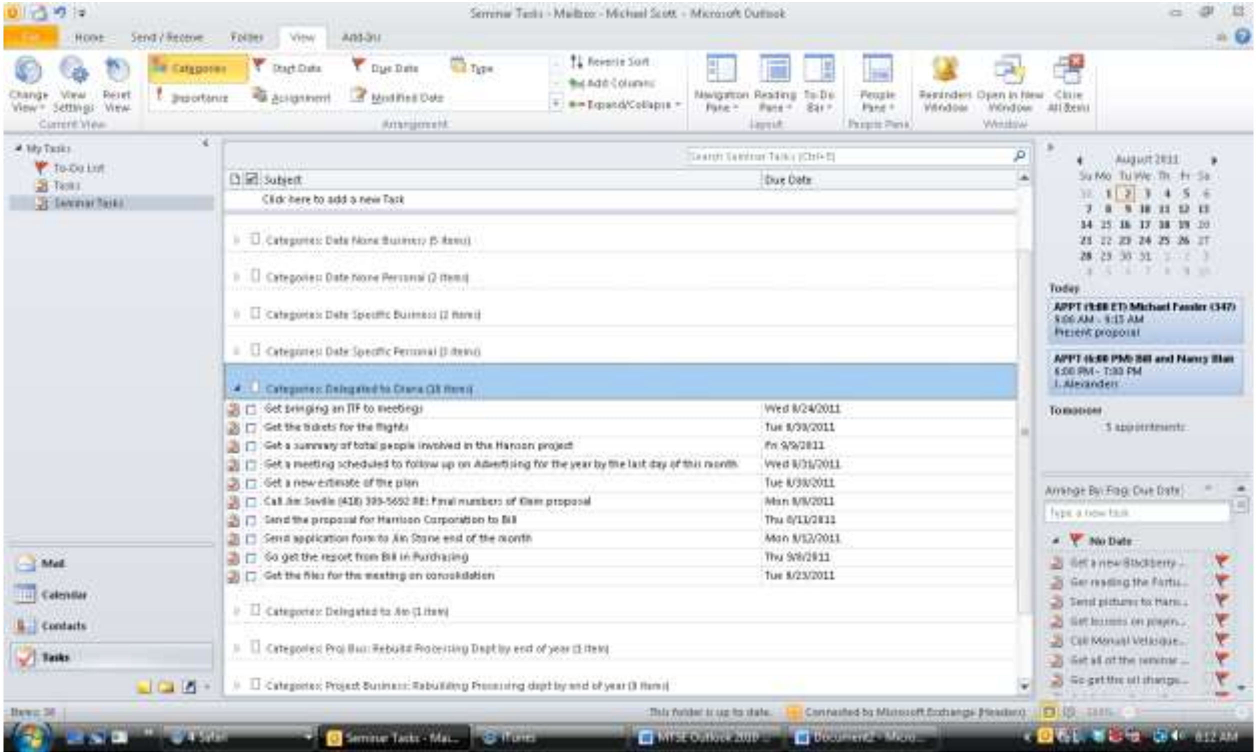
To see your tasks by Category click the View tab, then click the Categories tab and then collapse all of the groups. The following screen will appear:



If all of your tasks are showing in the categories, Click on View at the top of the screen, click on Expand/Collapse All Groups, Click on Collapse All Groups

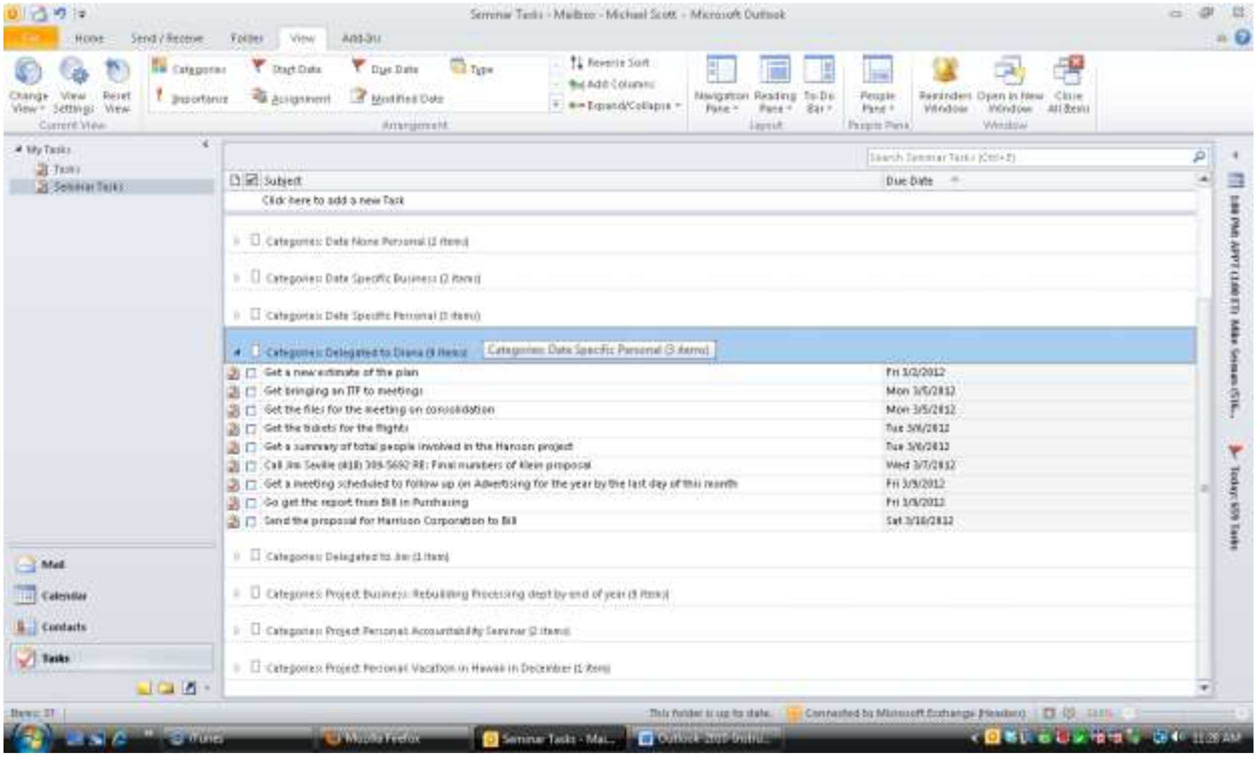
Viewing tasks within Categories

To see just the tasks within any specific category click the "+" sign on the category Groups



You can now view your tasks by category without getting overwhelmed by the whole list of tasks.

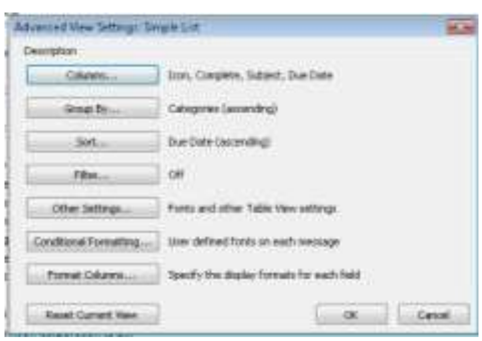
Sorting tasks, in date order, that are grouped by category



If your tasks have been grouped by category and you want to sort them in date order, of the following

Click on View Settings on the top left of the screen

Click on Group By and Choose Categories and the ascending button to the right and click OK



Click on Sort and choose Due Date and ascending and click OK

Your tasks are now grouped by category and in date order.

Dealing with an email containing a task

When you receive an email in which a task is imbedded, click the email and drag it to the task bar on the left and release. A task window opens up, enter all of the appropriate information, follow the guidelines for categorizing as stated above and save the new task

General guidelines for using Microsoft Outlook

- Put only appointments in the Calendar section. Put tasks in the task section..
- Put reminders only on Date Specific tasks (S) and appointments.
- Use Microsoft Outlook 2010 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 until you delete it or move it into a related folder.