

# ***TASK-it!***

**Effective Task Management  
with Outlook**



***by Roger Reece***

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*TASK-it* is an *external support system* designed to offload all unnecessary task management functions from your brain and give you the freedom to flow into each task with the *power of presence*.

# About the Author

Roger Reece, MBA is an author, professional trainer, motivational speaker, productivity consultant and executive coach. He is a frequent keynote speaker at business conferences, and provides workshops, consulting and executive coaching.



Roger's focus is on personal productivity, communication and teamwork. He teaches the art of being fully present and taking ownership of your work, your career and every aspect of your life.

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*“Confront the difficult while it is still easy;  
accomplish the great task by a series of small  
acts.”*

*- Lao Tsu*

This is not a book for casual reading. It's an implementation guide. If you're not sure whether you want to implement the TASK-it system, take some time to consider your level of commitment before you start re-configuring Outlook on your computer.

## ***The Value of Task Management***

Everyone uses a task management system of some kind. Whether you keep it all in your head or leave sticky notes everywhere as reminders, you have a system for planning, remembering, scheduling and completing tasks. The value of a comprehensive task management system such as TASK-it lies in its ability to manage everything you do without letting anything slip through the cracks.

Most people complain about not having enough time to get it all done. Since 24 hours is all you get each day, you can't get more time, but a good task management system can help you accomplish more in the time you have.

Everything you do is a task. When you get up in the morning, take a shower, eat breakfast, brush your teeth and get dressed, you're performing *tasks*. You perform the tasks of driving to work, reading your emails, checking your voice mails, and handling the crises and emergencies that occur during your workday. While it's true that you don't need a task management system to help you get dressed in the

morning, if you're having a hard time getting everything done, you can use some help.

Most people do the obvious things that are part of their routines, but are inconsistent in accomplishing the most important things at work and in their personal lives. The value of a comprehensive task management system is that it brings you face to face with the important things that you need to accomplish. Your system tracks everything and doesn't rely on your memory. It gives you an effective way of planning and prioritizing your tasks so the important things aren't overlooked.

A comprehensive task management system leverages your talents, skills and abilities and makes you more productive in every area of your life. In essence, it helps you to get more *value* out of life.

### ***What is TASK-it?***

TASK-it is a comprehensive task management system based on the task features of Microsoft Outlook. While Outlook's *email* and *calendar* functions are relatively straightforward, the *task* features are confusing and somewhat obscure. As a result, most people don't use them. Microsoft has done a great job in providing all the features you need to configure a great task management system, but what's the most effective way to configure and use those features? *TASK-it!*

If you create or open an Outlook Task, you'll find fields such as:

- Due Date
- Start Date
- Status
- % Complete
- Owner
- Total Work
- Actual Work
- Mileage
- Billing Information
- Companies

Most of these fields don't apply to the kinds of things you do every day. These fields allow you to do all kinds of complex things, but the complexity tends to scare people away. And for a good reason. You don't need a system that complicates your life and makes it harder than it already is to get everything done.

For this reason, TASK-it doesn't use many of the task features in Outlook. If you had the time and the inclination, you could probably come up with the perfect way to configure and use Outlook to meet your task management needs. But who has time to learn all the intricacies of Outlook and design the perfect configuration and set of procedures? That's where TASK-it comes in. It's a simple way of configuring and using Outlook as a highly effective task management system that's easily adaptable to anyone's work style.

There are plenty of good software packages out there, but I learned long ago that whiz-bang software companies come and go, and you can be left high and dry if you depend on them to continue to develop and support their products year after year. In my opinion, you can't go wrong with Outlook. Software companies come and go, but Microsoft is here to stay. And besides, odds are you're already using Outlook for your email and calendar, so TASK-it is a no-brainer. Just do a little tweaking based on the instructions in this book and you'll be ready to move forward with TASK-it, a great task management system.

### ***Getting Past the Dips in the Road***

TASK-it is easy to implement, especially if you are already using Microsoft Outlook for email and/or calendar management. The hard part is sticking with it after your initial startup period. I guarantee that if you start using it, you will at some point hit a "dip" in the road.

The dip may occur in the first week after your initial implementation, or it may not happen for a few months; but you will experience it. The *dip* is when you realize that you've started to slack off in your task management discipline. Maybe you notice that you're starting to use sticky notes again. You may have stopped having regular reviews of your task lists. The dip in the road is the point where you begin to consider dropping TASK-it and returning to your old, comfortable system.

How do I know you'll hit the *dip*? I did. Everyone does. You should consider it now, because if you're going to return to your old system anyway, you might as trash this book and keep doing what you're doing. On the other hand, if you decide to go through the steps of implementing TASK-it, you should consider making a long-term commitment to push past every dip you encounter along the road.

If you decide to make that commitment, I can help you navigate through some of the dips you're likely to encounter:

- “It just doesn’t fit my tasks and the way I work.”
- “It’s more trouble than it’s worth. It creates extra work for me.”
- “I’m just not using it. The only time I actually use it is when I force myself.”
- “There are too many times when a computer isn’t available.”
- “I tried it, but I just don’t like it.”
- “I stopped using it months ago. What’s the point of going back to it now?”

This book provides solutions for all the problems mentioned above, and more. But these aren’t the real issues. When you’re in a dip, your mind uses complaints such as these as *rationalization*. Success in overcoming the emotional power of the *dip* requires determination and the ability to ignore your mind’s complaints. Few people understand this simple principle, but those who do accomplish amazing results in life.

### ***Configuring Outlook 2010 for TASK-it***

In order to begin using TASK-it, you will need to make some minor configuration changes to Outlook 2010 on your desktop or notebook computer. Chapters 2, 3, 4 and 9 of this book will give you the instructions you’ll need to make those changes.

*Note: Although the references and illustrations in this book refer to Outlook 2010, TASK-it works with earlier and later versions of outlook. Some of the screens and menus are slightly different, but the functions are essentially the same.*

This book is written with the assumption that you have a working knowledge of Outlook. While the features and options used by TASK-it are explained in detail, this is not an Outlook manual. Depending on your level of knowledge and interest, you may need to refer to the Outlook help system or other documentation for more specifics on Outlook’s wide range of features and capabilities.

# Chapter One: Time, Task & Self-Management

*“Dost thou love life? Then do not squander time; for that's the stuff life is made of.”*

*- Benjamin Franklin*

## ***Time Management***

Regardless of what you do, time marches on minute by minute. Time is relentless and it doesn't wait for you to catch up. It is absolutely unmanageable. What we call *time management* is merely a set of disciplines that if followed will allow you to get more done in less time.

## ***Task Management***

Task Management is a methodology for managing the way you accomplish tasks. In discussing task management, it's helpful to establish four working definitions:

***Idea:*** a dream, wish or possibility

***Goal:*** a specific, desired, intended outcome with milestones for its accomplishment

***Project:*** a set of planned actions and defined tasks aimed at accomplishing a goal, or a milestone within a larger goal

***Task:*** a defined action or unit of work that can be completed in a single session

A task management system is a set of tools and processes employed in performing tasks. Since tasks are necessary to complete projects, achieve goals and transform ideas into reality, task management is critical to making things happen. In fact, everything you accomplish in life is the result of completing one or more tasks.

## **Self-Management**

Self-management is the necessary discipline required for you to break out of your natural habit patterns and effectively process ideas, goals, projects and tasks. Without self management, you may learn the principles of time management, but you won't implement most of them. Without self-management, your task management system is merely a set of conscious and unconscious habit patterns that achieve far from optimal results. It is your discipline in self-management that will make you successful in implementing the TASK-it task management system and in effectively utilizing it over the long haul.

But don't let me scare you off. With a moderate amount of self-management, TASK-it will become an effective tool for overcoming ineffective habit patterns that have formed in you over the course of your life. And you will be astounded at the results.

## **The Power of Presence**

When you're really *present* and in the *flow* of your work, it's amazing what you can accomplish. You're focused, creative, and all your energy seems to be channeled into the task at hand. Whether you're working alone in a quiet office, or interacting with others in the midst of external chaos, the power of presence cuts through the *noise*. You're in a state of focused awareness in which you're able to channel your skills and awareness for optimal results.

Unfortunately, most of us have to deal with distractions. External distractions include ringing phones, demanding people, impending deadlines a chaotic workplace and an ever-increasing workload. For most people, however, their internal distractions are the greatest barrier to being present and in the flow state. Internal distractions include:

- Unfocused and irrelevant inner-dialogue and self-talk
- Wrangling over what is or isn't happening while you're engaged in the task at hand
- Worries about what might or might not happen in the future
- Lamentations about what has happened or may have happened in the past
- Thoughts about other tasks, projects and situations, and mental efforts to work them out
- Thoughts about what you should be doing now, what you should have done in the past, or what you should do in the future
- Concerns about other people's attitudes and actions (or lack of action)

- Anxiety about problems and potential problems that are out of the range of your control
- Ongoing commentaries from your inner-critic, your inner-parent, and your inner-boss

In the *flow state*, you are present and the above-mentioned internal distractions are absent. But unfortunately, most people rarely experience the *power of presence*. It's not within the scope of this book to teach you how to be fully present, but by implementing the TASK-it system, you can eliminate some of the primary sources of your inner distractions and experience *presence* and *flow* more often during your workday.

### ***Out of Your Head and into the System***

Your brain is a wonderful instrument for generating ideas and bringing them into reality, but it isn't the best task management system. When I give my brain the responsibility of remembering everything that needs to be done and managing the entire process, it works overtime at doing the best job it can. Thoughts and concerns about what needs to be done pop up at random, and the more there is to do, the more chaotic and pressured the mental gyrations become.

Most stressed-out workaholics suffer more from their own random, self-imposed internal pressures than they do from external forces. The brain functions best when the extraneous details are *handled* and it can focus on the task at hand. TASK-it is an *external support system* designed to offload all unnecessary task management functions from your brain and give you the freedom to flow into each task with the power of presence.

But in order to achieve a successful TASK-it implementation, you must overcome the urge to over-rely on your brain in the task management process. If you've ever transitioned into the role of *manager* from the role of *individual contributor*, you may have already experienced the tendency to continue to do it all yourself. Effective managers stop doing it all themselves, and learn the arts of *delegation*, *empowerment*, *trust* and *accountability*.

### ***Delegate the Tracking of Your Tasks to TASK-it***

When you rely on TASK-it as your external support system, you stop trying to remember and manage tasks on your own. When a task that you can't do immediately comes to mind, enter it into the system and delegate the management of

the task to TASK-it. When you delegate the tracking of the task to your system, your mind can be at rest, because you know TASK-it will handle the job.

### ***Empower TASK-it to Support You***

When you immediately enter every task into the system as soon as you encounter it, you empower your external support system to fully support you. If you only go half way, continuing to rely on handwritten *to do* lists and sticky notes for some tasks, you strip TASK-it of its power.

### ***Trust Your System***

Delegation and empowerment require *trust*. But the more you rely on TASK-it, the more you will trust the system to prevent anything from slipping through the cracks. That trust will bring you a peace of mind that's impossible with any method of task management that relies on your memory.

### ***Hold TASK-it Accountable***

Hold your system accountable for doing its job. When you do your job and consistently enter all your tasks, TASK-it will do its job and provide you unparalleled support in keeping track of everything. Think of it as a kind of partnership. Your partner will make sure that you never forget the things you need to do, and you can focus your attention fully on doing what you do, efficiently and effectively.

## Chapter Two: Getting Started

*“Always bear in mind that your own resolution to succeed is more important than any other one thing.”*

*- Abraham Lincoln*

Outlook 2007 includes some very powerful, flexible, but often under-utilized task management features. Most Outlook users never use these features, or if they do, they eventually abandon them because they're too complex and cumbersome. TASK-it gives you the power of Outlook task management without the complexity.

Many of Outlook's task features, such as *percent complete* and *task assignment* are not used in TASK-it. Conversely, many of the features in TASK-it aren't obvious to most Outlook users, but are made available by specifically configuring your Outlook setup for TASK-it.

In this chapter you will begin the process of reconfiguring Outlook for TASK-it task management. The process is simple and straightforward, and doesn't require much technical skill. It also doesn't require IT support or changes in your Microsoft Exchange Server configuration. Everything you need to do can be done at your desktop with very little effort. The real effort is in changing your habits and really using TASK-it after the initial setup.

## The Four Primary Outlook Functions

Outlook includes four primary functions, each providing a range of configurable features. They are the:

- Mail
- Calendar
- Contacts
- Tasks

Configuring TASK-it mainly requires changes within Tasks, although you may also want to make a few configuration changes within the other Outlook functions in order to integrate Tasks more tightly with those functions. In this chapter as well as in chapters 3, 4 and 9, you will find instructions for making these changes, along with tips for customizing your configuration to fit your work style.

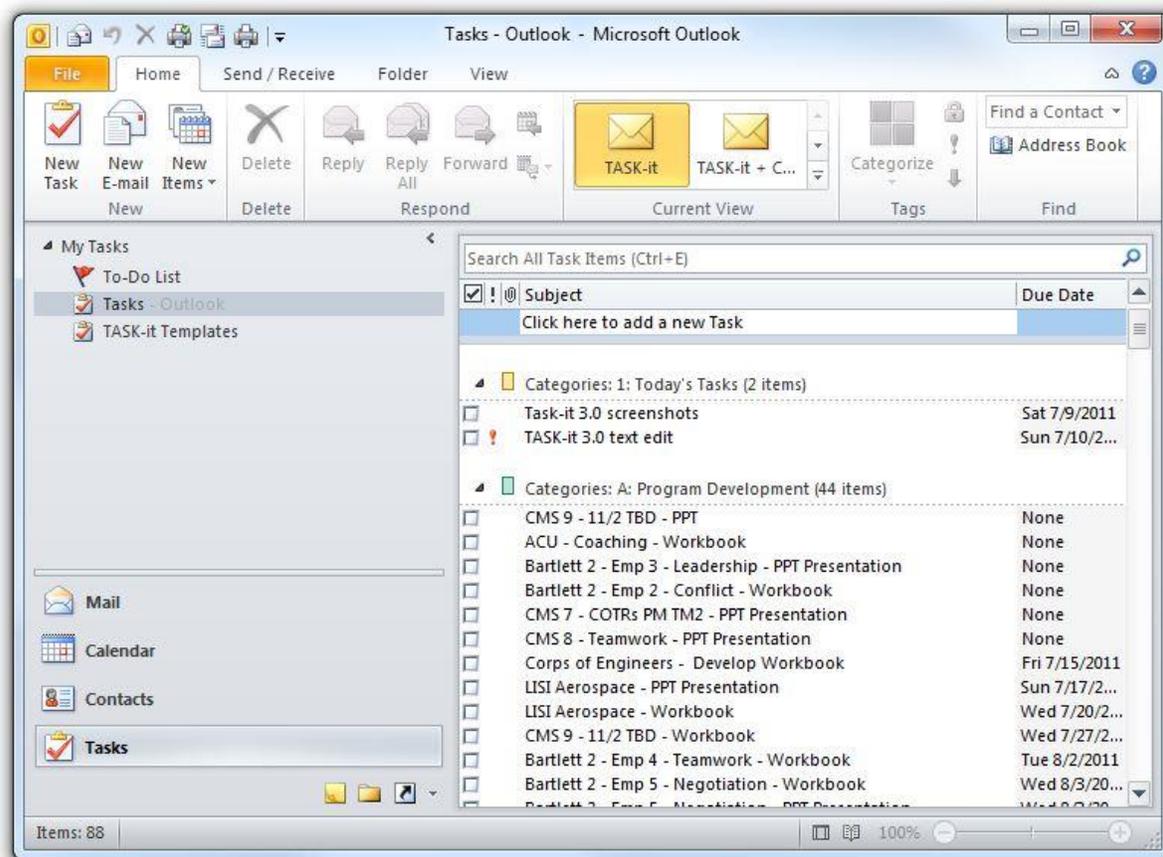


Figure 2-1: Outlook Tasks (TASK-it View)

Each of the primary Outlook functions is accessed in much the same way you launch a program from the shortcuts on your Windows desktop. The icons are displayed either as large buttons or small icons at the bottom of the Outlook *Navigation Pane* (the left vertical section of the Outlook screen). In figure 2-1 above, *Mail*, *Calendar*, *Tasks* and *Contacts* are all configured as large buttons, as is the *Folder List* option. Depending on your preferences, you can configure any of these buttons as small icons below the buttons by clicking on the *Configure Buttons* icon at the bottom right corner of the *Navigation Pane*.

In figure 2-1, the *Tasks* button is highlighted, and *Tasks* is displayed to the right of the *Navigation Pane*.

### ***Working with Tasks***

Once you have configured Outlook for TASK-it, you will access *Tasks* frequently. You can use the *Navigation Pane* icons to switch between *Mail*, *Calendar*, *Tasks* and *Contacts*, or you can open these functions in separate windows. By using the separate windows method, you can leave your Outlook windows open and switch between them as you would with any Windows applications.

To open one of the primary Outlook functions in a new window, right click on the function's button or icon (*Mail*, *Calendar*, *Contacts* or *Tasks*) and select *Open in New Window*. If you haven't used this feature before it may take time to break your old habits, but you may find it to be a more effective way of using Outlook than switching functions within the same window.

Most people close a window by clicking on the *X* in the upper right corner of the window. If you use that method, you will have to re-open all your Outlook windows each time you start Outlook. But if you exit Outlook by selecting "Exit" from the File menu, Outlook will remember the windows you had open and will automatically reopen them the next time you start Outlook. Once you get used to this process, the Outlook windows you use most will always be open and available.

### ***The To-Do Bar***

The Outlook *To-Do Bar* can be used to display your tasks side-by-side with *Email*, *Calendar* and *Contacts*. In Chapter 9 (Configuring & Using the *To-Do Bar*) I will discuss the *To-Do Bar* in more detail. In configuring Outlook for TASK-it, I recommend turning off the *To-Do Bar* in your *Tasks* view. To turn it off, click the *To-Do Button* on the *Home* tab of the *Ribbon* at the top of the screen and select *Off*.

## ***The To-Do List View vs. the Tasks List View***

Because some people use *Message Flags* as a way of highlighting emails that require action (I don't recommend this method), Microsoft has created a special View called the *To-Do List*. This view allows you to view tasks and flagged messages together. In the next chapter you will create a new view; the *TASK-it View*. Your *view* in Outlook Tasks defines what is displayed on your screen. Outlook is pre-configured with a number of standard views, including the *To-Do List View*. The Outlook Task views can be selected in the Current View section of the *Home* tab of the *Ribbon*.

## ***Creating a New Task in Outlook***

There are two primary methods of creating a new task in Outlook. The easiest method is to enter the subject line of the new task directly into the first line of the *Tasks* view (it's labeled, *Click here to add a new Task*). Once you have entered the subject line, double click anywhere on the line and the task opens in a new window.

The alternate method of creating a new task is to click on the *New Task* icon on the *Home* tab of the *Ribbon*. This opens a new task window, and you can then enter the subject line along with additional information about the task. The method you use is purely a matter of preference.

## ***Setting Up Your TASK-it Categories***

The first step in configuring *TASK-it* is to set up categories for your tasks. Without categories, you end up with a long list of unrelated tasks that are very difficult to manage. Although it's important to take some time to come up with the right set of categories for your work environment and style, don't spend too much time on it initially. You can easily change and add categories on the fly any time you like. What is initially important is using the *TASK-it* format so you can effectively manage your ideas, goals, projects and tasks.

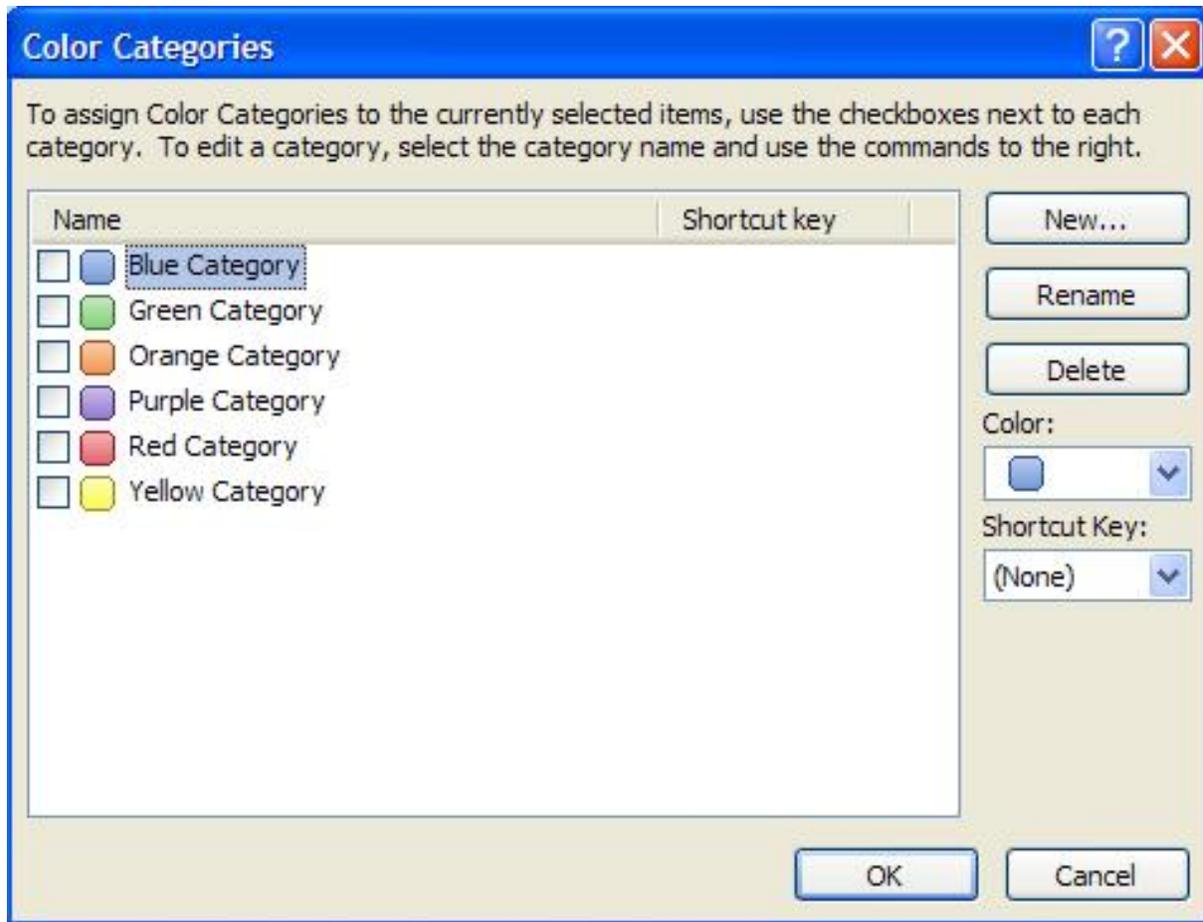


Figure 2-2: Outlook default categories

Outlook 2010 is pre-configured with color categories, as shown in the *Color Categories* window in figure 2-2 above. To view the *Color Categories* window, create a new task. Then click on the *Categorize* icon.

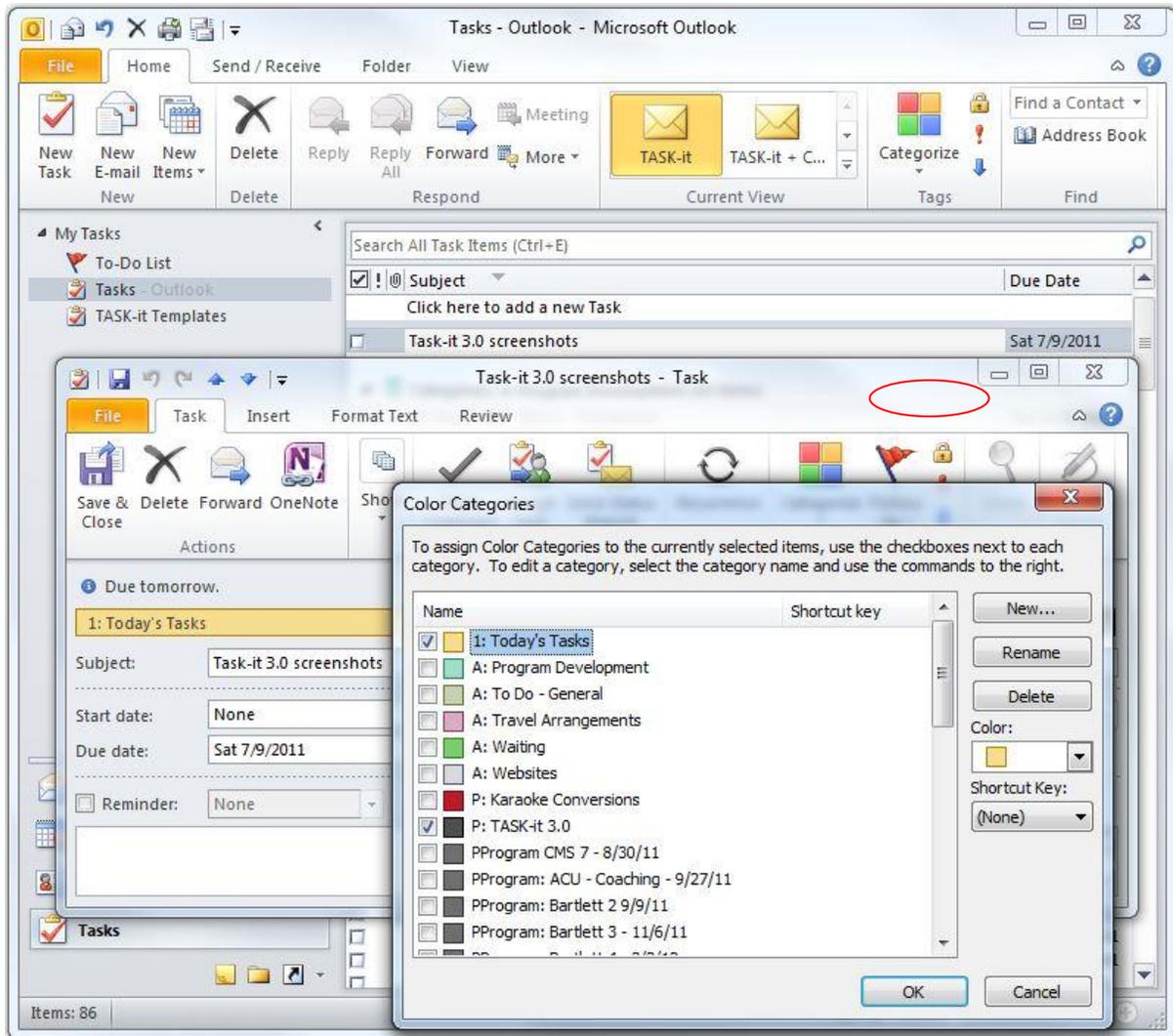


Figure 2-3: Assigning a category to a new task

The *Categorize* icon (circled in red in figure 2-3 above) is used to assign a category to a specific task; either an open task or any task you click on.

The categories are displayed alphabetically, so the TASK-it category naming scheme is designed to display your categories in a logical order. Task-it categories are divided into five task groups:

- Primary Tasks
- Action Tasks
- Projects
- Goals
- Ideas

By assigning one or more categories to each task, TASK-it gives you the ability to work from small, *categorized task lists*. This makes the process of task management much easier than working from one long task list.

### **Primary Tasks**

Your *Primary Tasks* group includes the tasks you plan to do right away (generally today). I recommend including only one category in this group: *Today's Tasks*.

Your TASK-it daily To-Do list will be every task in the *Today's Tasks* category. At the beginning of each day (or at the end of the previous day), you will review your tasks, and decide what you need or want to accomplish that day. To add a new task to your *Today's Tasks* list, you simply assign the *Today's Tasks* category to the task. To place an existing task in the list, click on the task, then click on the *Categorize* icon and assign the *Today's Tasks* category.

One or more categories will already be assigned to each existing task. It is not necessary to uncheck the other categories before assigning the *Today's Tasks* category. In fact, as you learn more about TASK-it you will find that assigning two or more categories to a task can be of considerable help in your task management process.

Based on the nature of your work, you may decide to create one or more additional *Primary Tasks* categories, but since the number of tasks you can complete in a day is limited, I think you'll find that the *Today's Tasks* category is all you'll need.

### **Action Tasks**

Whereas *Today's Tasks* is a group consisting of a single category, the *Action Tasks* group consists of multiple *Action Task* categories. In the *Action Tasks* group you will create categories that correspond to the kind of work you do. For example, when I'm not training or speaking at a conference, I spend a considerable time developing workshop content, writing, making travel arrangements, performing marketing tasks and developing/managing my websites. Each of these functional work areas is a category in my *Categories* list. Some of my other action categories are: *Collections*, *Make DVDs for Clients*, *To Buy + Errands*, and *To Do – General*.

When I sit down to book hotels, airline tickets and rental cars, I always check my *Travel Arrangements* list so I can make efficient use of my time and book several rental cars, airline tickets or hotels in the same work session. I often video my training workshops and provide DVDs of the training sessions for my clients. In order

to make a DVD, I have to copy the video files to my computer, perform minor editing and output to DVD format. It's much more efficient for me to do several DVDs at once, so I review my *Make DVDs for Clients* list before I start, so I don't overlook any DVDs that need to be sent to clients.

What are the most common types of work that you do? Think in terms of *batching* your work. If I need to drive to the office supply store to pick up a case of paper, what else can I do while I'm running errands? Before TASK-it, I would often remember something else I needed at the office supply store after I returned to my office. Now I consult the *To Buy + Errands* list on my smartphone while I'm running errands to make sure I don't forget anything.

I include a *Waiting* category in my Action Tasks group. Any time I'm waiting for someone else to do something for me, I create a task and assign the *Waiting* category so I'll remember to follow up if necessary.

## Projects

Although TASK-it isn't a project management system per se, it can be a tremendous help in tracking the tasks you need to perform in completing your projects. When you begin planning a new project, you will create a new category in the *Projects Group* for that specific project. Then, as you come up with tasks related to that project, you will create each task and assign the corresponding project name category within the *Projects Group*.

Many of my projects are somewhat repetitive in terms of the kinds of tasks I must perform. For example, when I book a new training workshop, I create a new project category corresponding to the name of the client. For each training workshop, I must do a certain set of tasks, including developing the customized workshop, booking travel arrangements, sending out contracts and invoices, etc. So I have developed a project template for each type of repetitive project I undertake. My *New Workshop* template includes the tasks I always perform for each workshop, making it faster to get rolling on a new project, and assuring that I won't forget to include important steps.

I assign an *Action Tasks* category to nearly every project task. I also assign the specific project category in the *Projects* group to each task. This forms a list matrix that allows me to manage tasks by project or by specific action. When I want to spend a block of time making travel arrangements, I work with my *Travel Arrangements* list, providing me with a list of travel-related tasks that cuts across all

projects. When I want to see what tasks remain undone on a project, I work with the project list for that project.

When you assign more than one category to a task, Outlook doesn't create multiple tasks. Although the same task appears in each category list, there is only one task in the database. When you complete a task, you can mark it *complete* while viewing it in an *Action* list or a *Project* list, and it will disappear (or display as completed, depending on the properties you define for completed tasks) from all lists. When you complete all tasks within a project you can remove the project from your Category List to keep the list as short as possible.

## Goals

The *Goals Group* typically consists of only one category: Goals. If you have a long list of goals, you may want to consider creating additional goal categories, such as *personal goals*, *career goals*, *work goals*, *family goals*, *financial goals*, *spiritual goals*, *community goals*, etc.

Each goal initially consists of only one task. Since Outlook allows you to enter a virtually unlimited amount of text in the description field, you can use this field to describe the goal, its milestones, and any kind of narrative you like. Once you're ready to begin actually working on achieving the goal, you will create one or more projects related to the goal. The *Goals* category as well as the specific *Projects* category or categories will be assigned to each task. This allows you to manage tasks by *Goal* as well as by *Project*. The same methodology can be used when small sub-projects are a part of a larger project. *Action* categories can also be assigned to the tasks within sub-projects, projects and goals, allowing you to view your work from many different angles.

Does every project need an associated goal? Only if it helps you to manage the project. The goal of each of my workshop projects is implicit in the project itself, so I don't create corresponding goals.

## Ideas

If you're like me, you can come up with a new idea any time, any place. I used to maintain physical files of ideas. Sometimes I would attend a seminar or conference, and take notes as the speaker was talking. Then I would *bury* the notes in the conference binder and put it on a bookshelf. Contained in my notes and in my files were some great ideas, but they were difficult to access and develop.

Now I enter new ideas in TASK-it and assign the *Ideas* category. Typically each idea is outlined within a single task. If you have a lot of ideas, you can create additional *Ideas* categories, by topic. Some ideas never go anywhere, and in your monthly task list reviews you may decide to delete them. But good ideas often need incubation time, and your monthly task review keeps these ideas alive.

I recently purchased a Tablet PC. Now, when I attend a meeting or conference, I take handwritten notes and draw diagrams using Microsoft OneNote and the Tablet PC stylus. Then, if there are good ideas within my notes, I convert them into tasks and assign the *Ideas* category. When I double click on the task, all my handwritten notes and drawings are stored within the task, and I can add any additional notes that may occur to me during my review sessions.

### ***Adding TASK-it Categories to the Outlook Categories List***

TASK-it categories are designed to display in a specific order:

- Today's Tasks group
- Action Tasks group
- Projects group
- *Goals* group
- *Ideas* group

You will precede each *Task Category* with a 3-character code as in figure 2-4 below in order to maintain the proper sort order. So, for example, the 3-character code for your Today's Tasks category (or categories) is 1, colon, space (1: ). This category naming convention, along with a few changes to Outlook's *Current View* settings (covered in Chapter 3) will allow you to effectively manage your tasks in sorted, organized lists.

You will create your new TASK-it categories from the *Color Categories* window. To get there, open a new task (*File, New, Task*) and click on the *Categorize* icon in the *Task* ribbon. Then click on the *New* button. In the *New Category* window, enter the category name (use the appropriate TASK-it prefix: A: , P: , etc.). A color can be added to the category for visual identification and grouping purposes. For frequently-used categories, you can select a keyboard shortcut to bypass the menu steps when assigning the category.

While you're in the *Color Categories* window, make sure you delete all of the Outlook pre-configured categories. To delete a category, click on the category and then click on the *Delete* button, then click *Yes*.

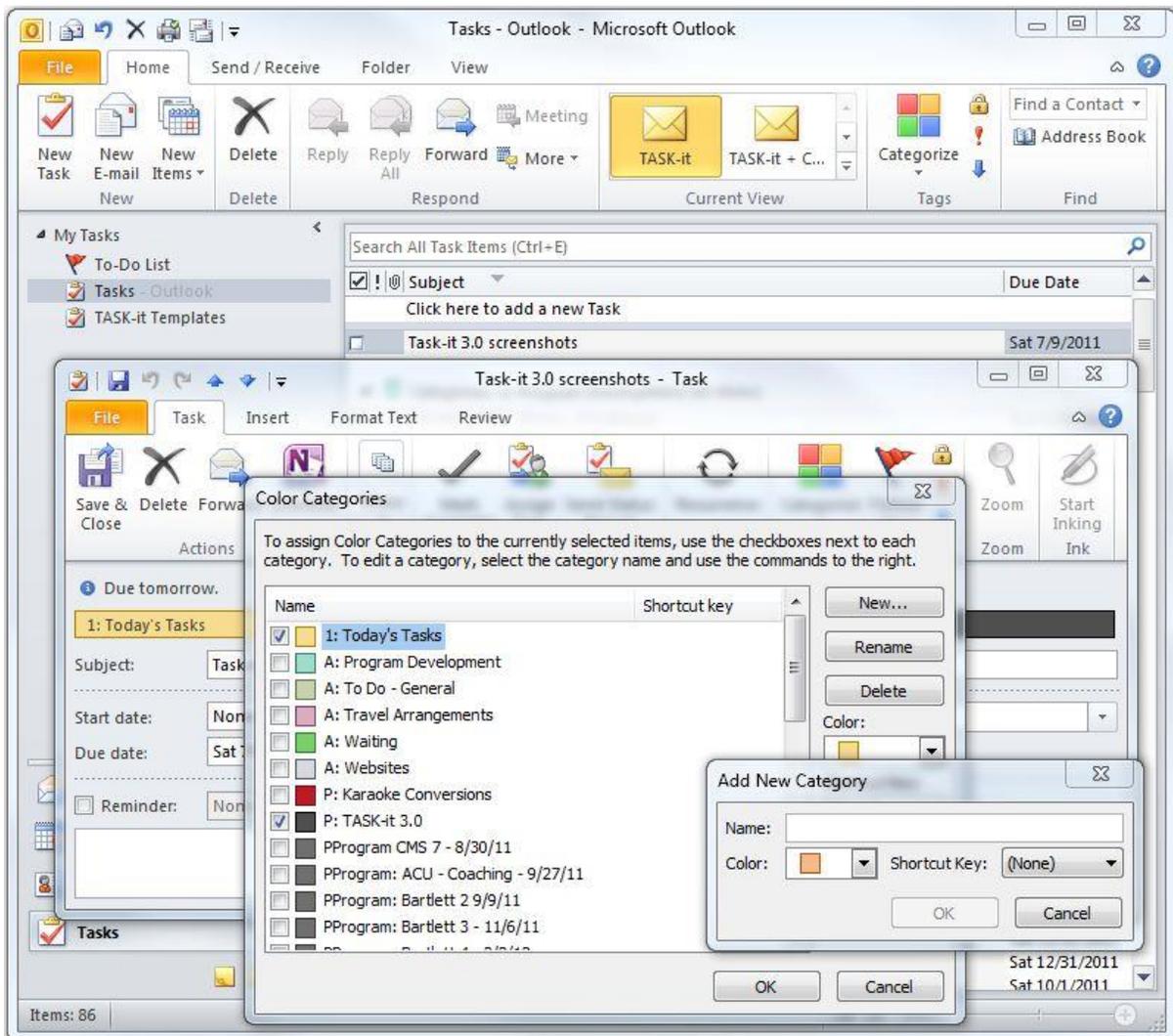


Figure 2-4: Creating your new TASK-it Categories

After you have entered your categories, enter a few tasks and assign your new categories. It's easy! When assigning one category, select it from the *Color Categories* window. When assigning multiple categories, select *All Categories* and check the categories you want to assign.

After assignment, categories appear as colored bars above the *Subject* line in the open task. To add or change categories, double-click on the category bar to display the *All Categories* list. From the *All Categories* list, you can rename a category, delete it, change its color, or assign a keyboard shortcut.

After you have entered some categories and tasks, you're ready to configure your TASK-it view.

## Chapter Three: Configuring Your TASK-it View

*“We forget that every good that is worth possessing must be paid for in strokes of daily effort. We postpone and postpone, until those smiling possibilities are dead.”*

- William James

### ***The Outlook Tasks Current View***

In Outlook, your *View* is the main area of the screen, below the toolbars and to the right of the *Navigation Pane*. In each of the four primary Outlook functions (Mail, Calendar, Tasks, Contacts, etc.) you have the ability to configure your own custom *Views*.

Your initial Outlook 2010 configuration includes a number of preset *Current Views* that can be selected by clicking the appropriate icon in the *Current View* section of the *Ribbon* (*Home* tab). The standard Outlook Tasks *Current Views* include:

- Detailed
- Simple List
- To-Do List
- Prioritized
- Active
- Completed
- Today
- Next 7 Days
- Overdue
- Assigned
- Server Tasks

Most of these Views, in their default configuration, are not useful in working with TASK-it. But with slight modification, some of these views can be very helpful. We will modify the *Detailed* view and make it your primary TASK-it view. Afterwards, we will copy the modified *Detailed* view, creating a new view, so that it can serve as a backup view if the Outlook default views are accidentally restored.

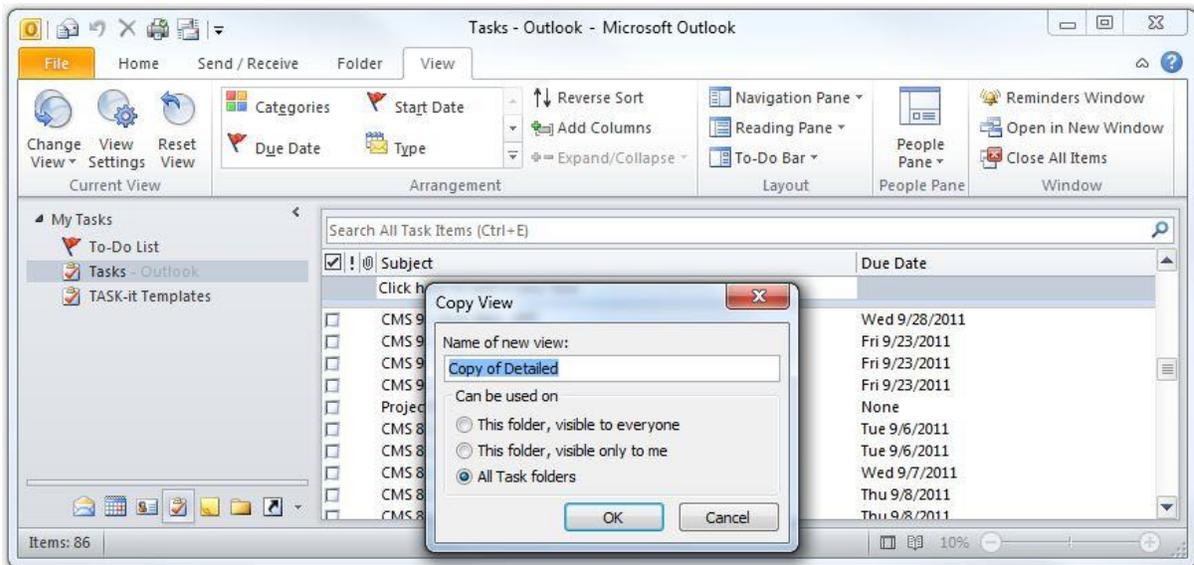


Figure 3-1: Making a copy of the Detailed view

You may find it useful to modify some of the other standard views and use them from time to time. This chapter will show you how to make the necessary modifications.

### **Creating Your Primary TASK-it View**

To create your primary TASK-it view you will modify the standard *Detailed* view. Select the *Detailed* view in Tasks by clicking on the *Detailed* icon in the *Current View* section of the *Home* tab in the *Ribbon*. Then right click on the *Detailed* icon and select *View Settings*. The *Advanced View Setting: Detailed* dialog box appears, which, among other things, gives you the ability to:

- Group the *View* by Category
- Display the columns you want to see
- Sort the tasks within each category
- Filter completed tasks from the view

## Grouping Your primary TASK-it View by Category

To Group by *Categories*, click the *Group By* button, select *Categories* from the drop-down list, make sure the *Ascending* option is selected and then click *OK*. This change will display your tasks by category, which is critical for managing your tasks and projects with TASK-it.

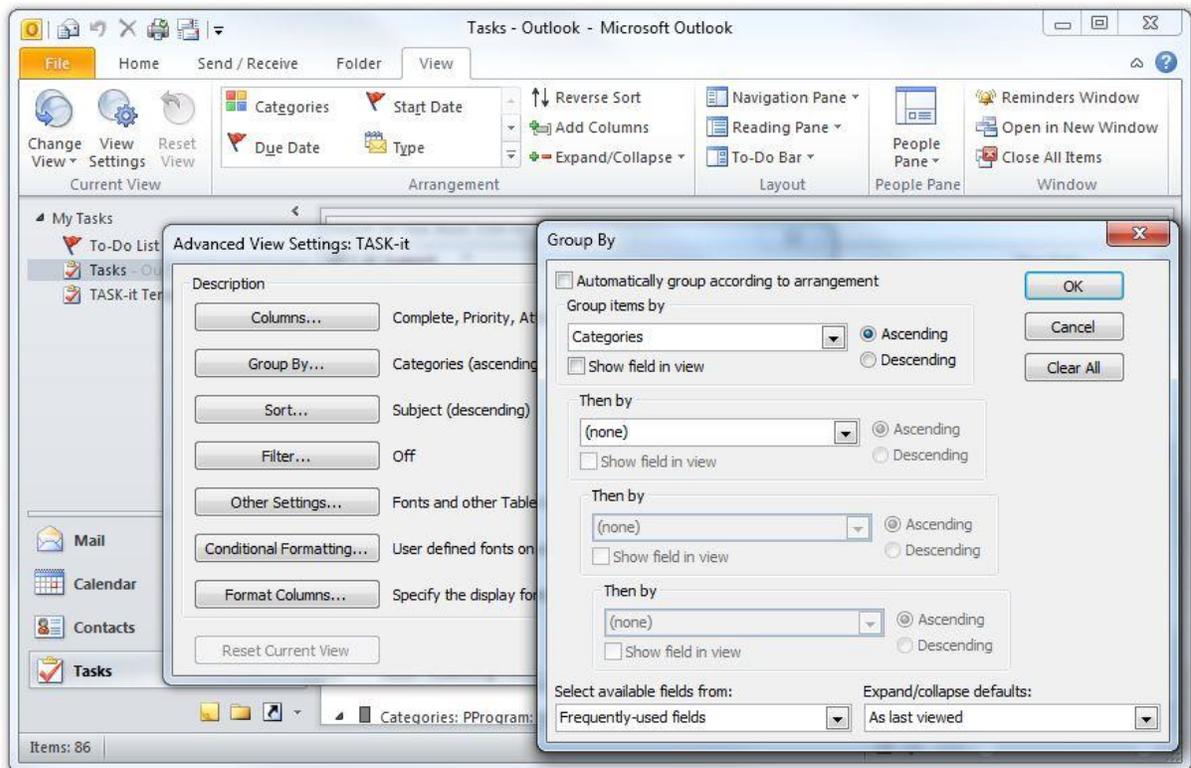


Figure 3-2: Group by categories

## Outlook Task Fields Used by TASK-it

Task *fields* are data elements pertaining to a task. When you define your primary TASK-it view, you determine which columns to display. So if you display the Subject column, your view shows the Subject field for each task in the Subject column. Many of Outlook's task fields, such as *Start Date*, *% Complete*, *Total Work*, *Actual Work*, *Mileage*, *Billing Information* and *Companies* are not used in TASK-it. Actually, you will only display five fields (columns) in your primary TASK-it view:

- Complete
- Priority
- Attachment
- Subject

- Due Date

### **The *Complete* Field**

The *Complete* field is a one-character field that you check when you complete the task. In Outlook's default *Detailed* view, completed tasks are displayed with a line through the task. Later in this chapter, we will create a rule to remove completed tasks from the primary TASK-it view to keep the screen uncluttered. We will also show you how to display the completed tasks when you want to see them.

### **The *Priority* Field**

The *Priority* field is a one-character field that allows you to assign one of three priority levels to a task. The default is *Normal* priority. By clicking on the field, you can select *High* to raise the priority of a task or *Low* to lower the task's priority.

### **The *Attachment* Field**

Since you can attach files to a task, it is helpful to see whether a task has an attachment. If you have limited storage space, attachments can be a problem since they are usually larger than the task itself. So having the *Attachment* field in your view allows you to quickly do a visual scan for files that can be deleted.

### **The *Subject* Field**

The *Subject* field is your summary description of the task. In many cases the subject field will be all you'll need to describe the task. If you open the task, the *Notes* field gives you a large scrollable area for additional task description.

### **The *Due Date* Field**

It isn't necessary to include a due date with each task, but for tasks with a specific deadline it's helpful to use the *Due Date* field. The reason TASK-it doesn't use the *Start Date* field lies in the definition of a task: *a defined action or unit of work that can be completed in a single session*. By that definition, tasks are generally started and completed in the same day. If you have a task that can't be completed in a single session, it should be defined as multiple tasks within a project.

## Displaying the Columns You Want to See

The columns (fields) to be included in your primary TASK-it view are *Complete*, *Priority*, *Attachment*, *Subject* and *Due Date*. If the *Advanced View Settings: Detailed* dialog box is still on your screen, select columns (to get back to the *Advanced View Settings: Detailed* dialog box, right click on the Detailed icon in the Current View section of the Home tab on the Ribbon).

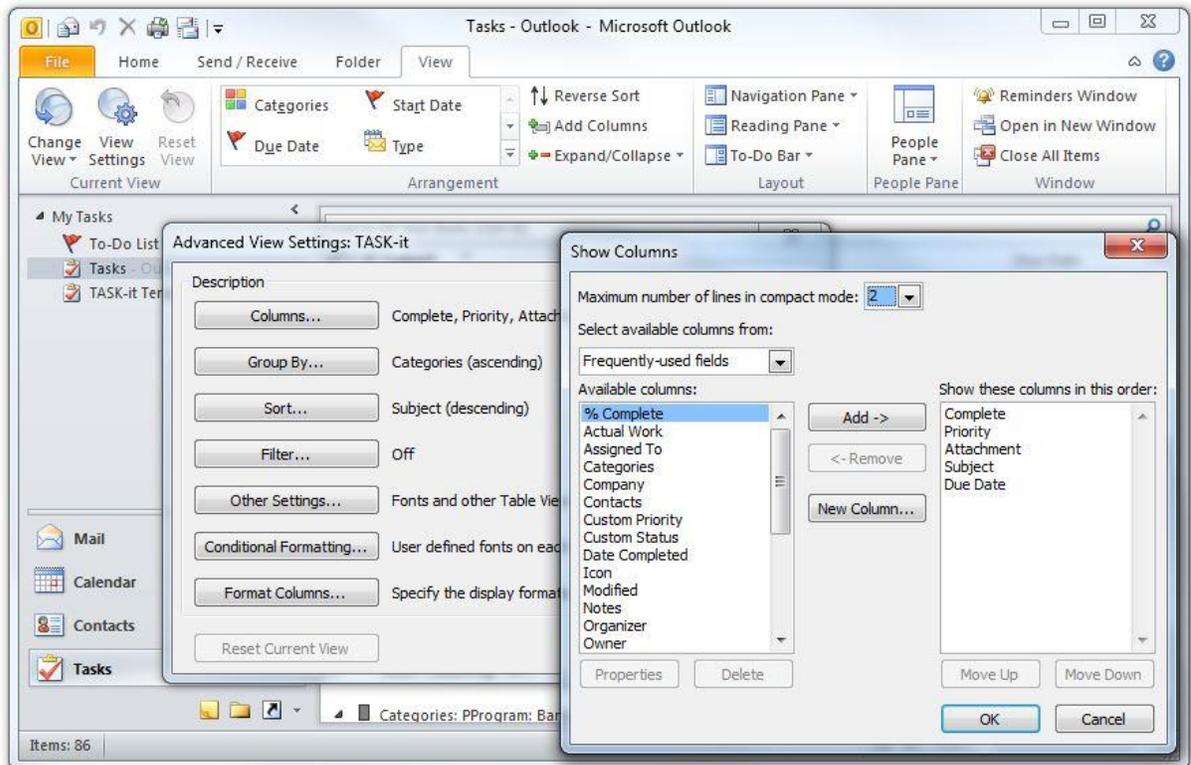


Figure 3-3: Select columns to display in the primary TASK-it View

The *Show Columns* dialog box should now be displayed. Select *Frequently-used Fields* from the *Select Available Fields* drop-down box. Select *Complete*, *Priority*, *Subject* and *Due Date* one at a time from the list of *Available Columns* and use the *Add* button to add them to the *Show these columns in this order* list on the right (see figure 3-4 above). Use the *Remove* button to remove the extra fields from the *Show these columns in this order* list. Then use the *Move Up* and *Move Down* buttons to put them in the correct order:

- Complete
- Priority
- Attachment
- Subject

- Due Date

Then click *OK*, and your columns are set for your primary TASK-it view.

### Sorting the Tasks within Each Category

The sort feature allows you to choose the order in which your tasks are displayed within each category. My suggestion is to sort by *Due Date* and then by *Priority*. After you have used TASK-it for a while, you may want to change the sort order or add more sort levels.

To sort your tasks by *Due Date* and then by *Priority* within each category (figure 3-5), click on the *Sort* button in the *Advanced View Settings: Detailed* dialog box (to get back to the *Advanced View Settings: Detailed* dialog box, right click on the *Detailed* icon in the *Current View* section of the *Home* tab on the *Ribbon*). In the *Sort* window, select *Due Date* and check *Ascending*. Then, in the first *Then by* section, select *Priority* and check *Descending*. Then click *OK*.

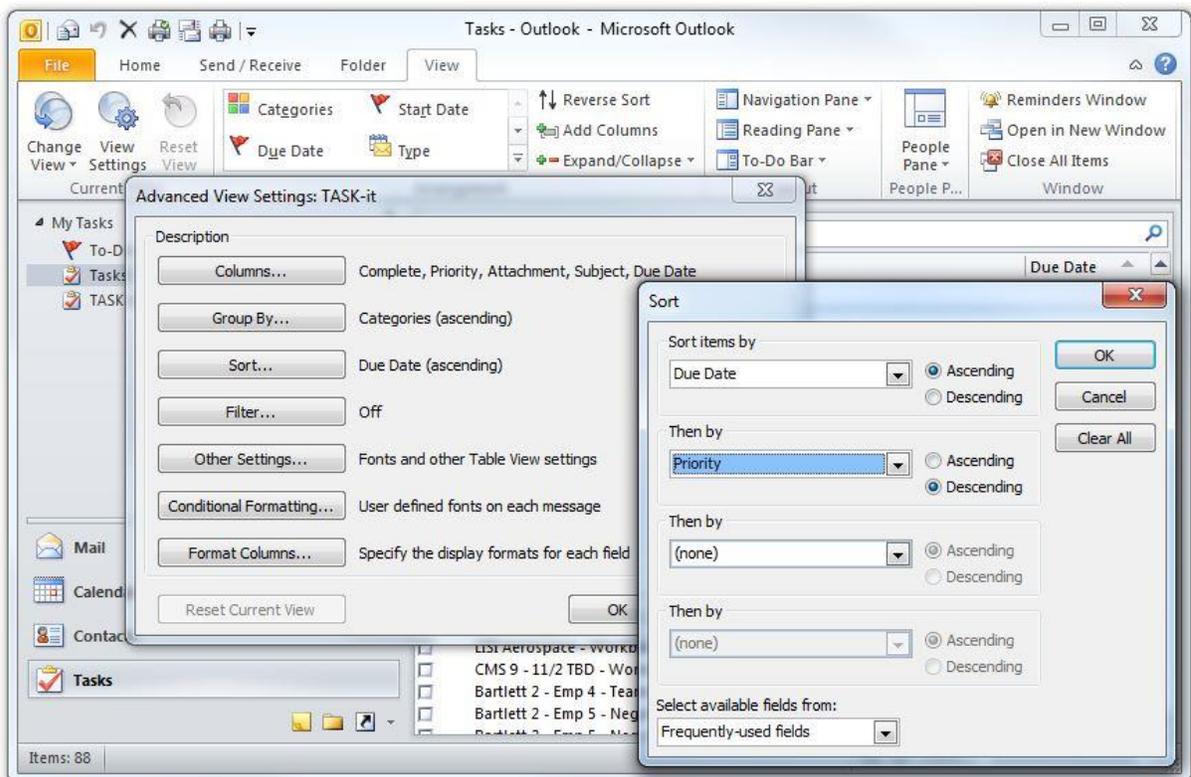


Figure 3-4: Sort by Priority

## Filtering Completed Tasks from the TASK-it View

Your final step in customizing your primary TASK-it view is to filter completed tasks. It might give you a great feeling of accomplishment to look at all the tasks you've completed, but it clutters your lists too much to make it part of your primary *TASK-it View*. After you make this configuration change you won't see your completed tasks, but if you ever want to display them I'll show you how after you finish this step.

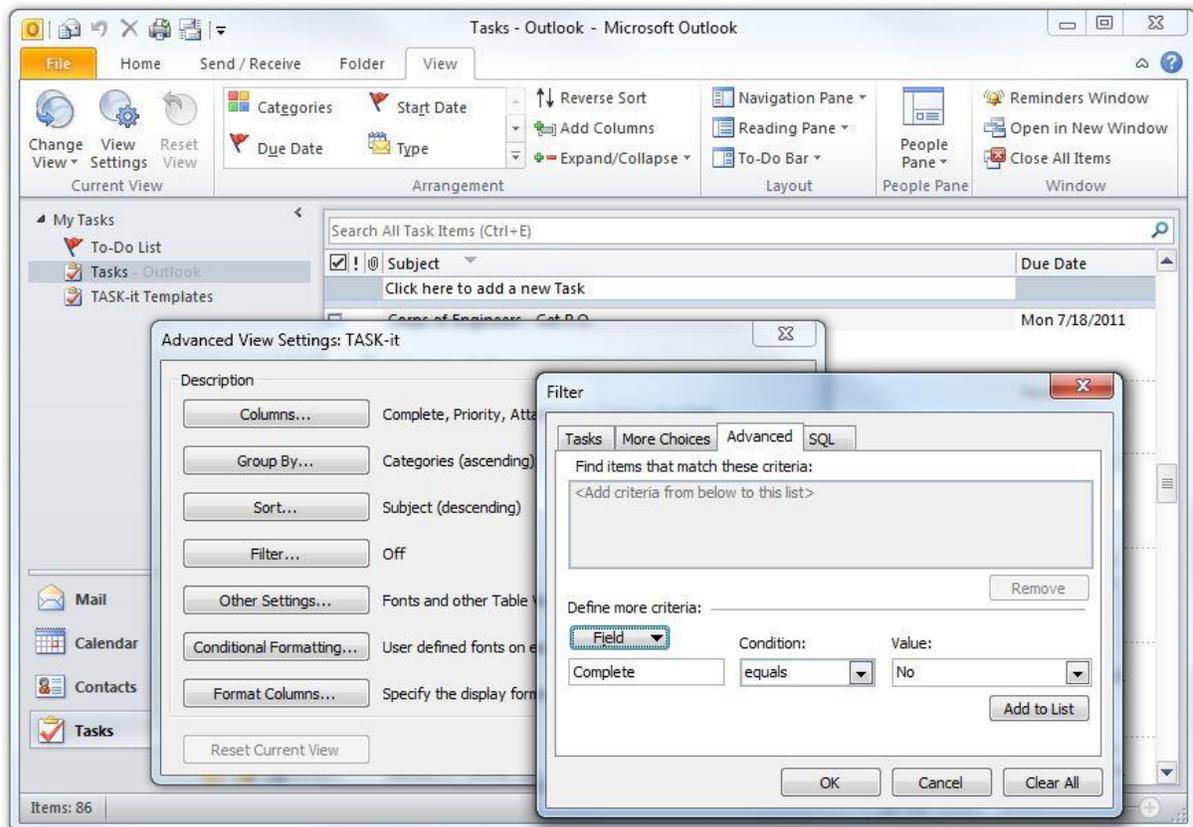


Figure 3-5: Filter completed tasks from the TASK-it View

To filter completed tasks return to the *Advanced View Settings: Detailed* dialog box and click on the Filter button to display the *Filter* dialog box. Then click on the *Advanced* tab and click on the *Field* button. Select *Frequently-used fields, Complete*. Then set *Condition* to *equals* and set *Value* to *No*. Click the *Add to List* button and then click *OK* and you're done.

## Your TASK-it View is Ready to Roll

Now your *Detailed* view is your primary TASK-it view, and you're ready to go to the next step. But first, I recommend that you create a duplicate of this view with the

name *TASK-it*. This will eliminate the need to re-create the view if the defaults get restored.

To create a duplicate view, click the *View* tab in the *Ribbon* and select *Change View* in the *Current View* section. Then select *Save Current View As a New View*. Enter *TASK-it* as the name of the new view, make sure *All Task Folders* is selected and click *OK*.

If you would like to have the option to display your *TASK-it* view with completed tasks, copy the view again, giving the new view the name *TASK-it + Complete*. Then select the new view as your current view and return to the *Advanced View Settings: Detailed* dialog box. Click the *Filter* button, click the *Advanced* tab, select the *Complete equals No* filter you created in the previous step and click *Remove*. Then click *OK* and you now have a *TASK-it* view that will display all tasks + completed tasks.

After you have been using *TASK-it* for a while you may want to look at all the default views. If any of them are useful, you can use these procedures to customize them to your needs.

But there's no need to spend any more time configuring Outlook now. The *TASK-it* view you just created is all you really need to get started, so stop trying to remember everything you have to do; *you're ready to roll!* If details about tasks, projects, goals and ideas pop into your head, just *TASK-it!* (Translation: enter them as tasks into the system)

## Chapter Four: Entering Tasks into the System

*“No one can cheat you out of ultimate success but yourself.”*

*- Ralph Waldo Emerson*

### ***Creating a New Task***

The easiest way to create a new task is to fill in the *Subject* line in the *Click here to add a new Task* field at the top of the *Tasks View*. Then double click to open the task window, and enter *Priority*, *Notes*, *Due Date* and possibly a reminder if appropriate. Don't forget to click on the *Categorize* icon to assign the appropriate category (or categories). Then click *Save and Close* and your task is saved.

If you have existing saved documents that you would like to attach to your task, such as an Excel spreadsheet, a diagram or a Word file, just click the paperclip icon on the toolbar or select *File* from the *Insert* menu. Outlook will store a copy of the file, and the shortcut will appear in the *Notes* field in the task. You can also drag and drop files, emails and other items into the *Notes* field of a task.

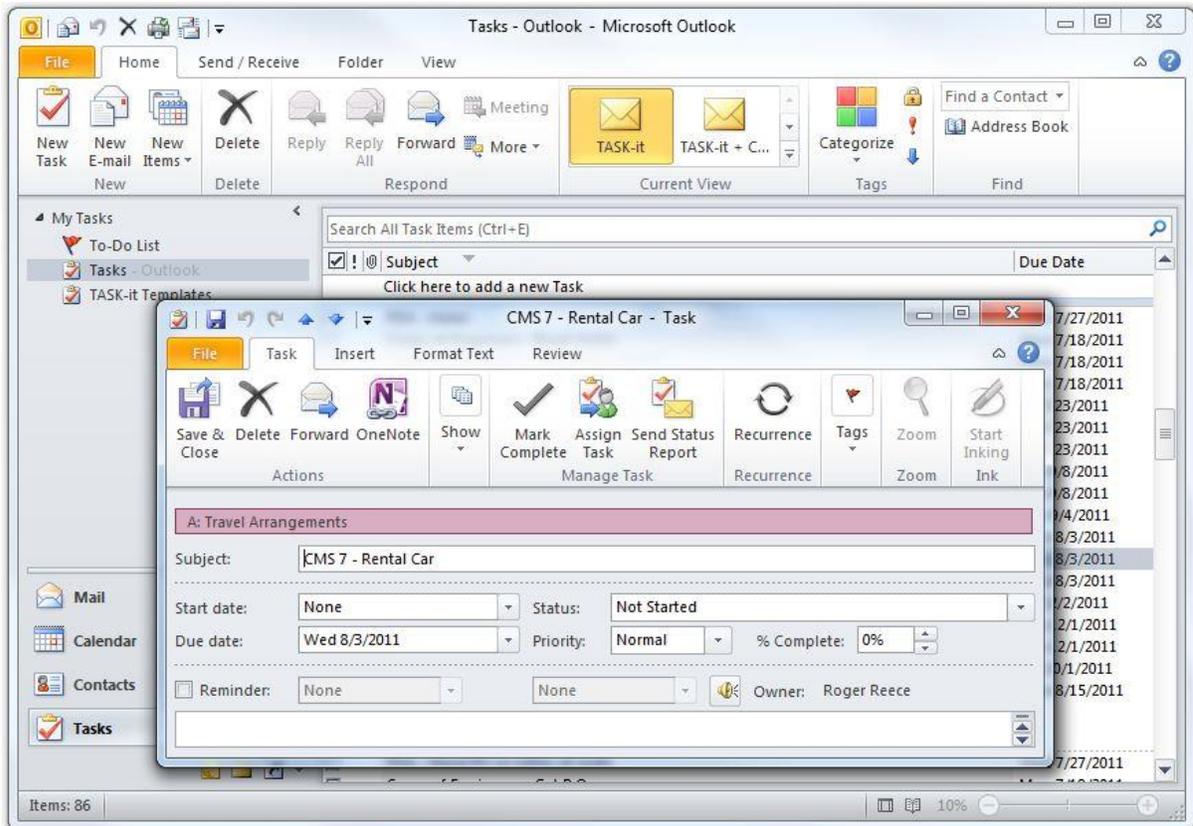


Figure 4-1: A task with an assigned category

## Creating a Task from an Email

Many Outlook users use *Mail* as a type of task management system. Since emails often include inherent tasks, they allow these emails to remain in their inbox, adding to the clutter. Outlook provides a very helpful feature that allows you to create a task directly from any email. This allows you to keep all tasks in TASK-it where they belong.

To create a task from an email, begin in Outlook Mail and click on the specific *Mail Item* to highlight it. Then drag it to the Tasks button or icon in the Navigation Pane. Outlook will then open a new task, place the subject of the email in the *Subject* field of the task, and the body of the email in the *Notes* field of the task. You can accomplish the same result by right clicking on the Mail Item and then selecting *Move to Folder, Tasks*.

If your email has one or more attachments, the attachments won't be included in the new task if you use the above method. However, you can copy and paste the attachment from the email to the task. To have Outlook automatically save the email's attachments as part of the newly-created task, drag the *Mail Item* to the *Task*

button or icon in the *Navigation Pane* while holding down the right mouse button (instead of the left mouse button as you would normally do to drag and drop an object). When you release the right mouse button over the *Task* button or icon, a menu will display. Select *Copy Here as Task with Attachment* from the menu, and a new task will open with the email text and attachments in the *Notes* field of the new task.

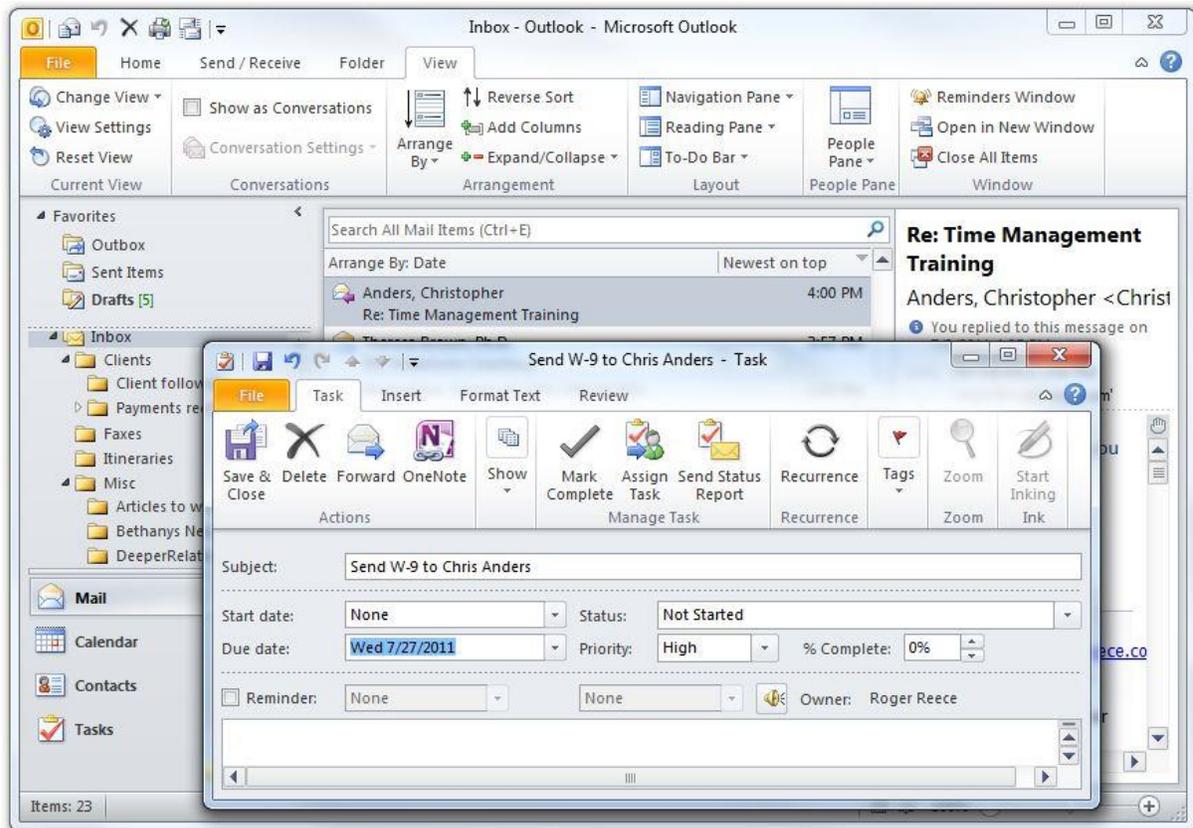


Figure 4-2: A new task created from an email

### Creating a Task from a Calendar Item

If you have scheduled an appointment and need to do some preparation prior to the meeting, you should create a task in TASK-it to ensure that the task will be accomplished by the appointment date. An easy way to do this is to drag the *Calendar Item* to the *Task* button or icon in the *Navigation Pane*. All the tips for creating a Task from an email in the previous section apply when creating a task from a *Calendar Item*.

Conversely, if you create a task and want to turn it into a calendar entry, you can drag the *Task Item* to the *Calendar* button or icon and fill in the appointment time. This is

a handy feature for scheduling an appointment with yourself to complete an important task.

### ***Creating a Task with Your Smartphone***

If you travel as much as I do your computer isn't always available when you want to create a new task. Nearly every smartphone comes with the ability to synchronize its calendar, mail, contact and task items with Outlook. And if it doesn't you can buy an add-in software module to get this valuable feature.

With my smartphone, which runs Android 2.3, I use a third-party app that allows me to create new tasks and assign the same categories I created on my computer. After you finish your TASK-it setup on your primary computer, the first time you run your sync program, the TASK-it settings, categories and newly-created tasks will be replicated on your smartphone.

### ***Recurring Tasks***

If you have tasks that recur daily, weekly, monthly, quarterly or yearly, you can set them up as *Recurring Tasks*. Create your task as normal and while the task window is open, click the *Recurrence* button on the Outlook toolbar. The Task Recurrence dialog box gives you the flexibility to set up the recurrence in just about any way you like.

So, for example, if you send out a monthly newsletter on the 15<sup>th</sup> of every month, your November 15 task will be created automatically, as will your December 15 task and your January 15 task. By assigning the appropriate category to your recurring task, each month's new task will be created in the correct TASK-it format automatically. Once your new monthly task is created, it is treated exactly like a manually-created task, and stays in your task list(s) until you click the *Complete* field.

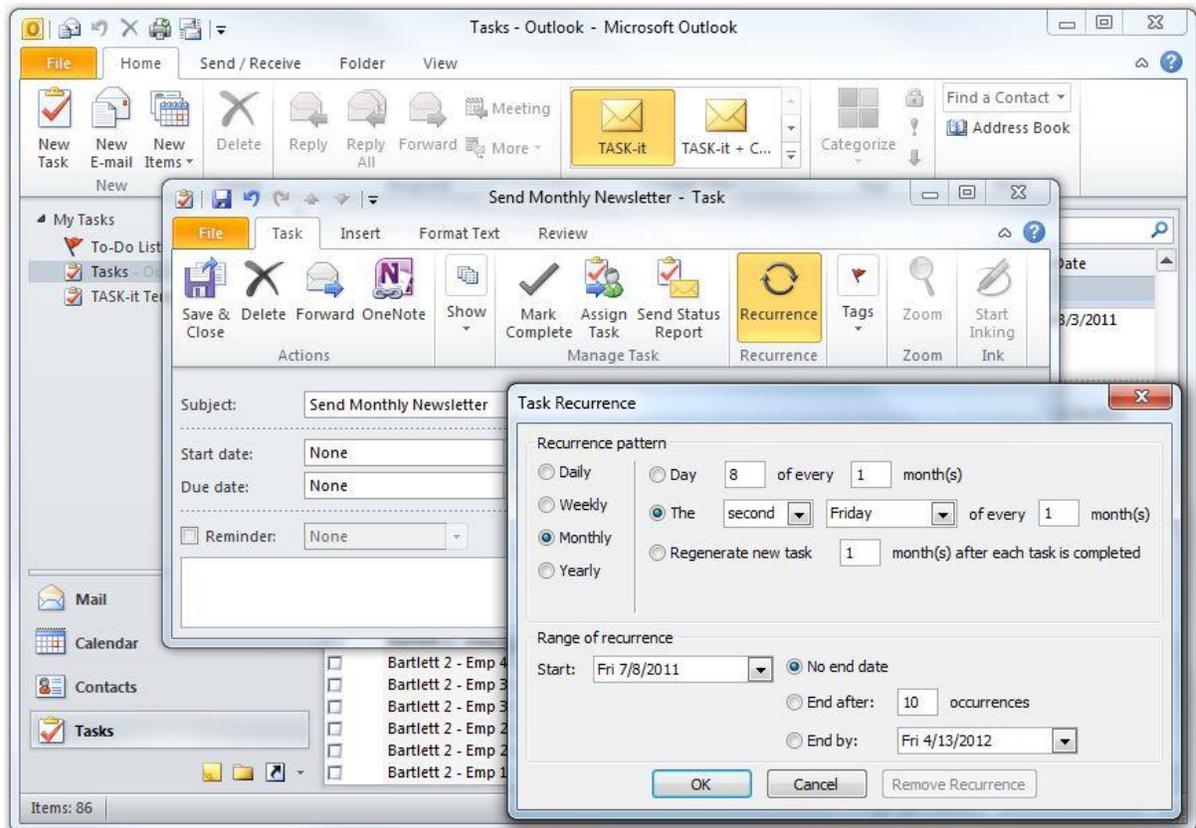


Figure 4-3: Creating a recurring task

## Make Your Initial Task Collection and Input a Priority

Now that you know how to input tasks, the quicker you collect all your tasks and get them into the system, the better. Make this a high priority during the next few days. See Chapter 10 for tips on getting all your tasks into the TASK-it system.

So what are you waiting for? Gather up your paper based *To Do* lists, sticky notes and the contents of your physical and email inboxes and begin the process of converting to your new system. You have only one choice to make about each item, either do it now or *TASK-it!*

## Chapter Five: Managing Your Tasks

*“I don’t wait for moods. You accomplish nothing if you do that. Your mind must know it has got to get down to work.”*

*- Pearl S. Buck*

Now that you have begun entering tasks into the TASK-it system, it’s time to learn how to manage those tasks. Your *Tasks View* is your master task list, and each category is a specific sub-list. You can display your lists on your computer or smartphone screen, or you can print any list if you prefer working with a hard copy.

### ***Printing Your Task Lists***

You can print your entire master task list by *Print* from the *File* menu. All tasks will print exactly as they are displayed in your *Tasks Current View*, so if the tasks in any list (category) don’t print, click on the plus (+) icon on the category line to display all tasks in that category. The best way to print your master task list is to select *Expand/Collapse Groups, Expand All Groups* from the *View* menu just before you print.

To print any individual list, click on the category line at the top of the list. Then select *Print* from the *File* menu. You can select multiple categories by holding down the *CTRL* key and clicking the categories to print.

I recommend managing your lists directly on your PC or smartphone so you can make immediate changes wherever necessary. When that's not possible, you can work from the printed list and make updates to TASK-it when you get access to your computer.

### ***Daily Planning and Task Review Sessions***

One of the most productive habits you can develop is the habit of conducting a *daily planning and task review* session with yourself. You can hold the session first thing in the morning, or in the evening, for the next day. *When* you do it isn't important - as long as you *do* it. Most people begin their work day by jumping into email, voice mail, their inbox, or a variety of other obvious tasks, and then one thing leads to another and before they know it the day is over. In my time management workshops, I work with hundreds of people every month to help them improve their personal productivity. But effective time management isn't about learning something new, it's about replacing old work habits with new, more productive habits. If you aren't holding daily planning sessions every day, let TASK-it be the catalyst to help you form this new, productive habit.

Your daily planning session is your opportunity to visualize your day, including your appointments, obligations and the tasks you need or want to perform. With TASK-it, you have a powerful tool for making your daily planning sessions even more productive. When fully-implemented, the TASK-it system will list every task you intend to do. Tasks will no longer remain hidden in emails, in your inbox, within stacks of papers, in binders, in drawers and in closets. But to be effective in prioritizing, scheduling and performing these tasks, you must conduct daily *task reviews*.

Your daily planning and task review sessions can take as little as ten minutes, but they will become the most important minutes of your day. During the session you will update your *Today's Tasks* list. As with any manual *to do* list, you will not always complete all tasks on your list every day. So the undone tasks from the previous day will be the first items you'll see as you begin your task review. In order to effectively plan your day, you need to review:

- The appointments in your calendar
- Additional appointments or meetings you need to schedule
- The tasks in your Today's Task list
- The tasks in your Action Tasks group
- The tasks in your Project Tasks group

If you are conducting planning and review sessions daily, you'll be amazed at how quickly you can review your appointments and tasks and visualize your day. The Outlook *To-Do Bar* (explained in Chapter 8), can be a great help in conducting your planning and review sessions, allowing you to review your calendar and tasks on the same Outlook screen.

In updating your Today's Tasks list, you may decide to leave all tasks remaining from the previous day on the list, but if you see the same tasks in your list day after day, you have a problem. It could be that these "tasks" are really projects disguised as tasks. Remember, if you can't complete a task in a single session, treat it as a project and break it down into smaller tasks.

It could be that the tasks that carry over from day to day just aren't that important. Uncheck the *Today's Tasks* category, and the task stays in your *TASK-it* system, listed in its appropriate *Action Tasks* or *Project Tasks* list(s). Just because you put it on your *Today's Tasks* list at a point in time doesn't mean it must remain there until you get it done. With manual *to do* lists, there is the tendency to carry items over day after day because of the feeling that if you remove them, they'll never get done. But with *TASK-it* and your planning and review sessions, nothing will ever slip through the cracks.

Your task reminders will alert you to any task with today's date as the due date, and any past-due tasks will appear in red, so you can't miss them.

During your daily planning and task review session you may decide to schedule a block of time on your calendar as *task time*, for completing a group of specific tasks on your Today's Tasks list or for simply tackling the whole list. Task time appointments are great for knocking out large numbers of tasks in a single, uninterrupted session. Obviously, you can't guarantee that by scheduling an hour of task time on your calendar you won't be interrupted. But by consistently planning blocks of task time, you will get more done than by flying by the seat of your pants.

On some days you'll be unexpectedly bombarded by emergencies and unavoidable interruptions that derail your daily plan. On other days, meetings and appointments are cancelled and you find extra task time. *TASK-it* helps you to continually regroup and make the best of every situation.

A high priority task on my *Today's Tasks* list may be to buy an airline ticket to San Francisco for a speaking engagement. While I'm on the Delta website buying the ticket, a quick review of my *Travel Arrangements* list (in my *Action Tasks* group) will let me know if I need to buy any other airline tickets.

Another task on my *Today's Tasks* list may be to send an invoice to a client. While processing the invoice, I get a vague feeling that I need to do something else for the client, so I quickly check my project list for the client's workshop. I realize that the due date for sending assessments to the workshop participants is tomorrow, so I get the jump on the task and do it today since some extra time has opened up.

As you begin using TASK-it you will find that it's one of the most powerful tools you have for making each day a productive experience.

### ***Monthly Planning and Task Review Sessions***

I recommend that you conduct a full review of your task list once a month, including the tasks in your *Goals* group and *Ideas* group. You will find that it's during these monthly sessions that your ideas turn into goals and your goals grow into projects. As you review existing projects and tasks, new tasks will come to mind, so your task list is bound to grow as a result of these sessions. On the other hand, it's the perfect time to delete tasks that are no longer relevant, or that you have completed but never checked the *Complete* box.

Your monthly task review is the perfect time to make adjustments to your TASK-it categories. Do you need new *Action* categories? Can you see new projects on the horizon that need *Project* categories in your *Projects* group? Your monthly planning and task review sessions will help you to reorder and reprioritize tasks, adjust due dates, and generally keep your TASK-it system tuned up and functioning properly. These sessions will also help you to visualize the coming month so you can gear up for what you need to accomplish.

### ***Using TASK-it throughout Your Workday***

The more you use TASK-it the more you will rely on it as your external support system. Your brain is equipped with amazing mental facilities including short and long-term memory. But your recall facility doesn't always work as perfectly as you would like when you really need it. And the more you try to rely on your memory for important information, the more your mind tends to "haunt" you with all the important loose ends that need to be dealt with.

TASK-it offloads the task storage and retrieval functions from your brain to a highly reliable external support system that you can use as a tool any time you:

- Come up with a new idea you want to remember

- Realize there is something you need to do, but can't do it immediately
- Have a disruption in your day and need to regroup
- Need to review the undone tasks within a project
- Want to brainstorm new ideas
- Find some extra time in your day and want to make it productive
- Want to reprioritize the tasks within your day
- Start a task, and want to accomplish related tasks in the same work session
- Want to do some short or long-range planning
- Find yourself on an errand and wonder if there's something else you need to do while you're out

Any new tool, process or system seems cumbersome and unnatural at first. That's to be expected. But if you stick with it, you'll learn to rely on TASK-it, and you'll continually find new ways to use your external support system throughout your workday.

### ***Using TASK-it for a More Effective Personal Life***

Your tasks don't end when you go home from work. Unless the organization you work for has specific rules against it, the same TASK-it system you use at work is perfect for managing your personal tasks. Even if it's not allowed, you can set up a personal TASK-it system on your home computer.

TASK-it allows you to manage your personal time more effectively, and may be the first tool you've ever used for personal task management. Most people never graduate from random to *do* lists on scraps of paper, and they wonder why they never seem to have enough time to get it all done at home.

Set up a personal To Do list category in your *Action Tasks* group ("A: To Do – Personal"), and you immediately have a place to separately track your personal tasks. If you decide to set up a separate personal system for your personal tasks but want to keep it on the same computer, you can create a separate Outlook *Personal Folder* (.pst file) on your hard drive. Then you can access it with a single click in the *My Tasks* section in the Outlook *Navigation Pane*. If you want to access it on your work and home computer, create it on a USB drive and carry it with you between home and work.

Don't let technology or physical logistics keep you from implementing TASK-it for your personal life. Outlook and today's computer technology make it possible to solve just about any TASK-it logistical problem you can come up with.

Keeping track of the things you need to do, planning, prioritizing and managing your time are as important in your personal life as they are at work because all your time is valuable. Although there are more workaholics in the world today than ever before, most people do *have a life* outside of work. Ineffective personal task management can result in a frustrating, chaotic home life or a general lack of accomplishment.

TASK-it can help you to eliminate disorganization and clutter, keep the promises you make to yourself and others and make sound priority decisions about what you're going to do and when you're going to do it. Often the most important things get crowded out by less important, more demanding daily personal tasks. TASK-it is an effective tool for managing your personal and family goals and priorities so you get what you want out of life. Just as with your work tasks, the more you use TASK-it in your personal life, the more you will grow to depend on this valuable external support system.

## Chapter Six: Managing Projects

*“Nothing is particularly hard if you divide it into small jobs.”*

*- Henry Ford*

### ***The Role of TASK-it in Project Management***

If you need a project management system, use Microsoft Project or one of the many software packages that can help you develop network diagrams, determine your critical path and manage all aspects of your projects.

But even project managers find TASK-it an effective tool for managing tasks and small projects that don't fit the standard project management profile. Years ago I managed teams of software project managers, and TASK-it would have been a perfect tool for everyone on my team, if it had been available.

Using my definition of the term *project*, anything you can't do in a single session qualifies for TASK-it project status.

Have you ever found it hard to gather up the energy to clean out and organize a closet at home? As long as you see it as one big task, the tendency is to put it off because of the *out-of-sight, out-of-mind* principle. You open the closet door, you think about how you need to get rid of things, organize the closet and maybe install some kind of efficient closet system. Just thinking about it is uncomfortable because you have so many other things to do. So you close the closet door. Out of sight, out of mind.

But it's never really out of mind. It's up there in your head somewhere, along with thousands of other nebulous *tasks* that are too time-consuming and too unpleasant to be your highest priorities. One of the greatest benefits of TASK-it is that feeling of control you'll experience when you have finally entered everything into the system. Life just feels more manageable. And with TASK-it, it is!

But that doesn't mean the closet will get cleaned out and organized any sooner. Now that it's in your task list, you'll be reminded of it more often. You may even escalate its urgency by setting a higher priority and assigning a due date. But if the due date comes and goes (turning the item red in your task list) and it's still undone, your problem may be that you're trying to manage a project as though it were a task.

Is it possible to clean out and organize the closet in one day? Yes. With all your other commitments, is it probable that you'll dedicate an entire Saturday to this task? Probably not. In determining what a single *session* is for you, it's important to be realistic and consider your typical work habits. Unless you're highly focused, I recommend that you consider two hours to be the maximum length of a single session.

With this in mind, your closet task has just become a project. Some of the potential tasks in this project might be:

- Clean out the junk
- Get rid of some of the clothes you don't wear any more
- Make a plan for your organized closet
- Make a parts list for a trip to Home Depot
- Go to Home Depot and buy everything you need
- Install your new closet organizer system
- Organize everything within your new closet

As long as you look at "*clean out and organize the closet*" as one big task your mind will tend to resist getting started.

### ***Convert Large Tasks into Projects and Give them a Jumpstart***

The best way to avoid the procrastination habit is to convert the task into a *Jumpstart* task within a new project. Simply create a new project category: "*P: Bedroom Closet.*" Then change the subject of your task to "*Jumpstart Bedroom Closet Project.*"

What is a *jumpstart*? A project jumpstart is a task in which you focus on your project and do as much planning (and possibly execution) as you can in 30 minutes. The only thing that you absolutely must accomplish during your jumpstart task is to enter the next task within the project that you intend to accomplish.

You may end up with a comprehensive task list for the project as a result of your jumpstart session. You may actually complete several small project tasks during the session. But if the project isn't complete at the end of your session (and it probably won't be), when you click the jumpstart task's *Complete* box, your next project task should already be in your project list. Then make sure that although you may not have a full project task list for the project, you always finish a project task by creating the next task within the project category.

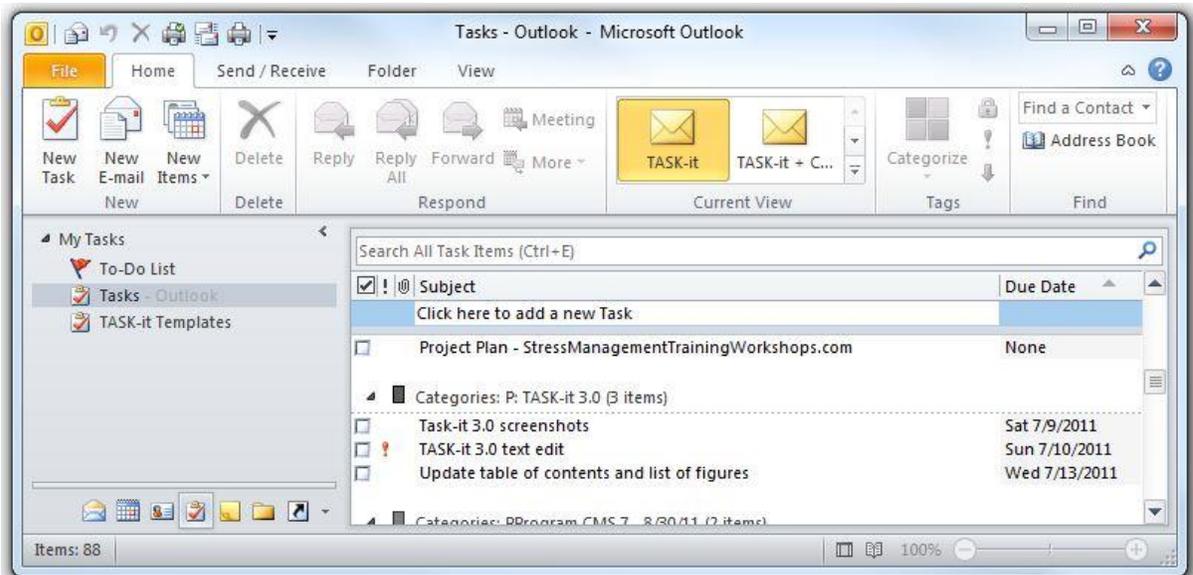


Figure 6-1: Tasks within a project

So your *“clean out and organize the closet”* task becomes a project, and *“clean out the junk”* becomes the second task (after your jumpstart task). You may find that the jumpstart concept gives you a new feeling of freedom when starting new projects, so that you accomplish more than expected during the jumpstart task. If you actually clean out the junk during the jumpstart, you can create a *“get rid of old clothes”* task as your next task in the project.

In this way when you review your tasks and projects, you will be less likely to fall into the procrastination habit. How do you eat an elephant? Turn it into a project and TASK-it!

## Setting up a Project Template

If your work includes frequent projects with the same or similar tasks, you can create TASK-it project templates. Each project template will be saved as a set of tasks in a *Tasks* subfolder. For example, if I schedule a workshop for ABC Company, my tasks will typically include:

- Send Contract
- Send Invoice
- Send Final Outline
- Buy Airline Tickets
- Book Hotel
- Book Rental Car
- Develop PPT First Draft
- Develop PPT Final
- Develop Workbook First Draft
- Develop Workbook Final
- Send Assessment Passwords

Although the TASK-it project template process isn't fully automatic, it's a great way for me to jumpstart a new project. My project begins after I agree with client ABC on a date for the workshop. At that time I create a new project category: "*P: ABC Workshop.*" Then I either jumpstart the project or create a Jumpstart task and assign the *P: ABC Workshop* category.

When I sit down for my 30-minute *Project Jumpstart* task, the first thing I do is copy the appropriate set of tasks from my *New Workshop* template, and with a few minor adjustments my project tasks are set up in TASK-it. Since this process typically only takes about five minutes, I still have plenty of time to do some real planning and knock out a few of the simple tasks on the list during my Project Jumpstart session.

To set up a *TASK-it Templates* folder, click on the *Folder List* icon at the bottom of the *Navigation Pane* and then right click on the *Tasks* folder in one of your *Personal Folders*. Select *New Folder* and make sure *Task Item* is selected in the *Folder contains* field. Enter the name *TASK-it Templates* and click *OK*.

If you only have one project template, you can create the template tasks directly in this folder. If you have more than one, you can create a subfolder within the TASK-it Templates folder for each template. Create your tasks in the template folder and assign the appropriate *Action* categories. Include any notes that may be helpful. That's all there is to it.

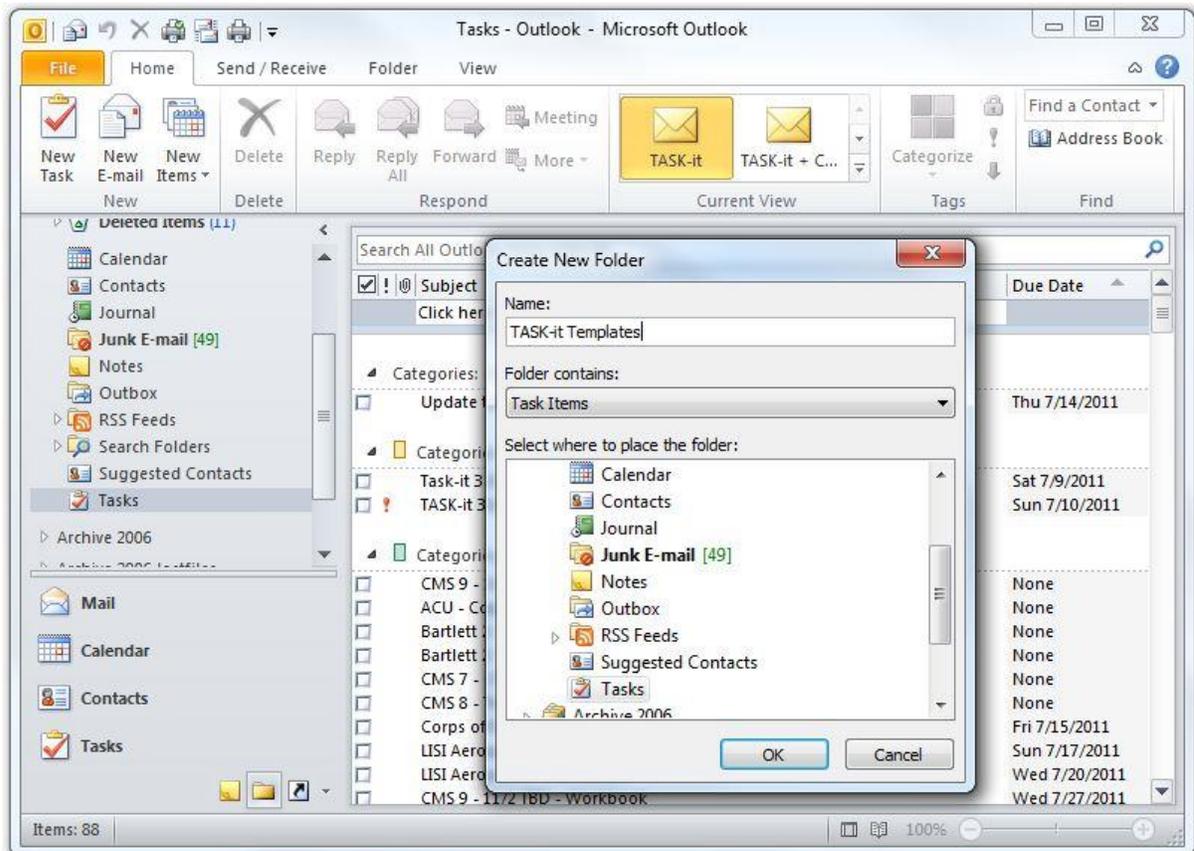


Figure 6-2: Creating a TASK-it Templates folder

When you're ready to create a new project from a project template, go to *the TASK-it Template* folder, locate the appropriate set of template tasks and copy the tasks (highlight the tasks, then select *Edit, Copy*). Then go to the main *Tasks* folder and select *Edit, Paste*. Because the template tasks do not have category assignments, they will appear grouped together as the first items in your Task list. Now all you need to do is to modify the *Subject* lines of each task and add notes, due dates, reminders (if appropriate), and assign categories.

TASK-it is all about getting things out of your head and into your system. Using templates for your similarly structured projects will help reduce your reliance on memory when defining new project tasks.

### ***When a Task Gets Stalled, Make it a Jumpstart Task***

The primary reasons most people procrastinate is because the task is unpleasant, unfamiliar, large, time-consuming, complex or boring. Any time you notice that you

seem to be avoiding a task, add the word Jumpstart at the beginning of the task subject line.

With a *jumpstart* task you're only committing 30 minutes to the task. Period. Anyone can stand working with an unpleasant, unfamiliar, large, time-consuming, complex or boring task for 30 minutes. Jump into it and see what you can do in the first 20 minutes. If it's clear you can't complete the task in your 30-minute jumpstart session, use your final 10 minutes to convert it to a project and define your next task in TASK-it. If you follow this simple process, you'll be amazed at how effective you'll be in completing those stalled tasks



## Chapter Seven: Delegating and Monitoring

*“Few things help an individual more than to place responsibility upon him, and to let him know that you trust him.”*

*- Booker T. Washington*

### ***Implicit and Explicit Delegation... and TASK-it***

Effective delegation and monitoring of tasks is an essential management skill. But it's not just for managers, because any time you expect your boss, a coworker or a customer to do something an implicit, delegated task exists within your expectations.

The topic of *delegation* is beyond the scope of this book, but as you're entering your tasks into TASK-it, don't forget to also enter the tasks that you have explicitly or implicitly delegated to others. Effective delegation requires good solid communication with mutual agreement, so the more explicit you can be in describing your expectations and getting feedback from the person(s) you're delegating the task to, the better. But in any case, if you expect it to get done, enter it in TASK-it and give it a *Due Date*.

### ***Dumping and Waiting***

Some people confuse *dumping* with delegating. Dumping usually implies that you're giving an unwanted task to someone else, with little communication, feedback or follow-up. TASK-it will help you transition from *dumping* to *delegating*.

While you're waiting for someone else to do what you expect them to do, what kind of progress are they making? How do you know? TASK-it gives you a process for:

- Confirming what you expect right after the task is delegated
- Monitoring the task's progress
- Tracking delegated tasks until completion

### **Confirming What You Expect**

Usually tasks are delegated during meetings or phone conversations. Did everyone hear the same thing? Are you on the same page? After your conversation, write an email to the person(s) you delegated the task to, outlining your conversation, your agreements, and what you expect in terms of the actual deliverable and its due date.

Then go to your Outlook Mail *Sent Items* folder and drag the item to the *TASKS* button or icon in *the Navigation Pane*. This opens a task with the same subject line as your email. Modify the subject line as necessary. The text of your email is in the *Notes* field of your task. Add any details that may help you to monitor the task. In the *Due Date* field, enter the expected completion date and set a *Reminder* for the date you would like to check on the status of the task. Then assign the *A: Waiting* category to the task. If you don't have a *Waiting* category in your *Action* group, add one.

### **Monitoring the Task's Progress**

Your *Waiting* list is not designed to make you a micromanager. It's designed to help you to *inspect what you expect*. This was the delegation mantra I was given in my initial training as a new manager back in the 70s. It still holds true today. Don't wait until the due date to check on the status of an important delegated task.

Use your *Task Reminders* to remind you to follow up. When you check on the progress of the task, you show the person you delegated it to that it's important, and that you haven't just dumped it. In monitoring, you can also add some feedback that may improve the quality of the completed task.

### **Tracking Delegated Tasks until Completion**

Just like any task, your delegated tasks remain in *TASK-it* until completion. Once you know the task is done, you can click the *Complete* box and it disappears from your *Waiting* list.

Whether you explicitly delegate a task to someone else, or whether you are just expecting it to get done, don't just wait for it. Create a task and tag it with the *Waiting* category so it doesn't fall through the cracks.

## ***Assigning Tasks to Others through Outlook***

Although Outlook gives you the ability to create tasks and assign them to others, I recommend that you wait to implement this feature until:

- You have been using TASK-it for at least 90 days
- The people you assign tasks to are actively using Outlook Tasks

Then, if you begin using this powerful feature, don't use it as a license to dump unwanted tasks on others.

## Chapter Eight: Ideas and Goals

*“The best way to have a good idea is to have lots of ideas.”*

*- Linus Pauling*

*“Goals are not only absolutely necessary to motivate us. They are essential to really keep us alive.”*

*- Robert Schuller*

Ideas are like seeds. They can grow into great accomplishments, but they must be planted and watered so they can germinate and grow. I encourage you to use TASK-it as a way of recording and reviewing your ideas so they can germinate and grow into goals, projects and completed tasks.

### ***Planting Your Ideas in TASK-it***

Several years ago, I came up with the idea of creating a website for each of my areas of training (Time Management, Leadership, Conflict Management, etc.). It seemed like a lot of work, and I had no idea if it was worth the effort, but I entered it as an idea in TASK-it. Sometimes great ideas fall by the wayside because they are simply forgotten. When you enter your new idea as a task in the Z: Ideas group, your task will not be forgotten.

This year, I converted my website idea into a goal in my Z: *Goals* category. Then I created a project for each website, and so far I've completed eight of those projects. If you want to turn your ideas into realities, start by entering them into TASK-it.

If you have a lot of ideas, you can create *Ideas Categories* within the *Ideas Group*, - such as *Inventions, Songs, Poems, Business Ideas*, etc. In my case, I put all ideas in a single list under the Z: *Ideas Group*.

## **Germinating Ideas through Monthly Review Sessions**

During your monthly review session, you will review all your TASK-it lists, including your Ideas and Goals. Whether you actually do anything with your ideas is not as important as simply remembering and periodically reviewing them. Your mind will do the rest automatically. This process keeps your ideas alive in the stream of your mind, and allows them to germinate and grow. As they grow, some ideas will prove to be impractical, uninteresting, or irrelevant. Some ideas, however, will catch your attention as they grow, and you will begin to catch a vision for how valuable they really are.

These valuable *ideas* have great potential for growing into important *goals*.

## **Converting Ideas into Goals and Projects**

A Goal is a valuable idea that you have developed a vision for. You can visualize the end result and you're willing to put forth the effort to make it a reality. All it takes to convert an *Idea* into a *Goal* in TASK-it is to uncheck the *Z: Ideas Category* and check the *Z: Goals Category* for the task. It only takes a second, but in doing it, you're saying, "*I will achieve this goal.*" If you're not ready to say it, leave it as an *Idea*.

When you convert the *Idea* into a *Goal*, you're stating your intention to achieve the goal, but there are still questions about how and when you'll achieve it. Depending on the magnitude of the goal, it may take a lot of planning and consideration. The *Notes* section of the *Goal* task gives you plenty of room to develop your plan, strategy and milestones for achieving the goal. When you're actually ready to move from the planning to the action stage, you'll create one or more projects in your *Projects* group. The single *Goal* task in the *Goals* group will outline the details of the goal, but the project(s) in the *Projects* group will contain the actual tasks for getting the job done.

## **Completed Tasks and the Feeling of Accomplishment**

As you work with TASK-it in capturing ideas, converting them to goals and then accomplishing those goals through effective task management, you will begin to fully realize the true value of TASK-it. It can make the difference between just having good ideas, and actually creating a new reality for your life.

When you come up with a new idea, don't just dream about it; *TASK-it!*

## Chapter Nine: Configuring & Using the To-Do Bar

*“I long to accomplish great and noble tasks, but it is my chief duty to accomplish humble tasks as though they were great and noble. The world is moved along, not only by the mighty shoves of its heroes, but also by the aggregate of the tiny pushes of each honest worker.”*

*- Helen Keller*

If your days are typically filled with appointments, you may find it cumbersome to toggle between Outlook’s *Calendar* and *Tasks* functions. But Microsoft has given you a great solution: The *To-Do Bar*.

### ***The Outlook To-Do Bar***

The *To-Do Bar* displays your *Tasks* on the right side of the Outlook screen, and can be selectively turned on or off within each primary Outlook function (*Mail*, *Calendar*, *Contacts* and *Tasks*). Displaying the *To-Do Bar* in *Tasks* is redundant, so you can easily turn it off by clicking the X in the top corner of the *To-Do Bar* in your *Tasks* view.

If you turn the *To-Do Bar* off in any of the Outlook primary functions, it will remain off in that function until you turn it on again. To turn the *To-Do Bar* on within *Mail*, *Calendar* or *Contacts*, click the *View* pull-down menu and select *To-Do Bar*. Then select *Normal*. When the *To-Do Bar* is turned on in *Mail*, *Calendar* or *Contacts*, you can minimize it or maximize it by clicking the double arrows at the top of the *To-Do Bar*.

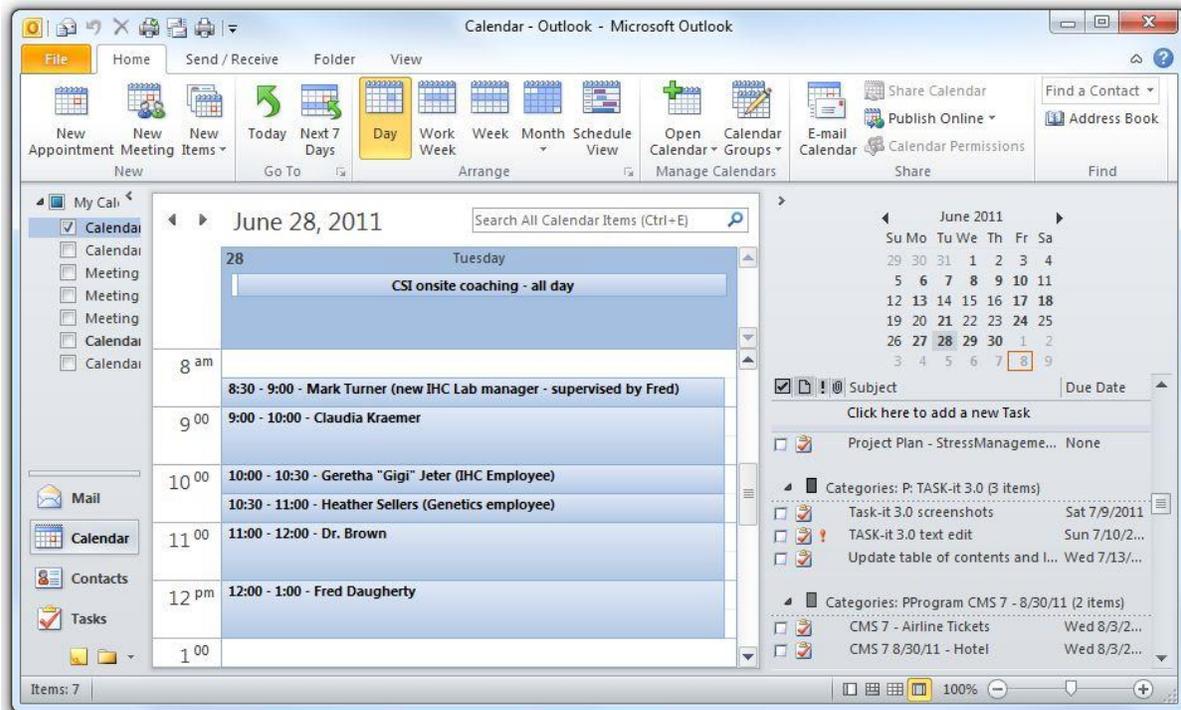


Figure 9-1: The Outlook To-Do Bar displayed with the Calendar view

## Customizing the To-Do Bar

You can customize the *To-Do Bar* to display tasks only, or to include a monthly calendar navigator and/or your appointments in addition to your tasks. You can also customize the *To-Do Bar* so that it displays your tasks exactly like the *TASK-it View* described in Chapter 3.

To define which of the three *To-Do Bar* elements are displayed (*Date Navigator*, *Appointments* and *Task List*), click on *View* tab in the *Ribbon* and in the *Layout* section, select *To-Do Bar*. Then check the elements you want to display. If you check *Date Navigator* and/or *Appointments*, you can also select *Options* to specify how many rows of *Date Navigator* months and how many appointments to display within the *To-Do Bar*.

To customize the *To-Do Bar* to display the *TASK-it View*, right click on the *To-Do Bar* Task Field Label Header (the line that displays the task field names) and select *View Settings*. This displays the *Advanced View Settings: To-Do List* dialog box, from which you can change the same four settings you changed in creating the *TASK-it View* in Chapter 3:

- Group by *Categories*
- Display the columns you want to see
- Sort the tasks within each category
- Filter completed tasks

### **Group your To-Do Bar Tasks View by Category**

From the *Advanced View Settings: To-Do List* dialog box, select *Group By*. Then select *Categories* from the *Group Items By* drop-down box, make sure *Ascending* is selected and click *OK*.

### **Display the Fields You Want to See**

Select *Columns* from *Advanced View Settings: To-Do List* dialog box and select *All Task Fields* from the *Select available fields from* drop-down box. Then use the *Add* and *Remove* buttons to place only the fields you want to see in the *Show these fields in this order* box (*Complete*, *Priority*, *Task Subject* and *Due Date*). Then use the *Move Up* and *Move Down* buttons to arrange them in order.

Add the *Priority* and *Due Date* fields by clicking on each one in the *Frequently-Used Fields* list and then clicking *Add*. The *Complete* and *Subject* fields should already appear in the *Show these fields in this order* list. Then use the *Move Up* and *Move Down* buttons to place them in this order:

- Complete
- Priority
- Subject
- Due Date

Remove any extra fields with the *Remove* button.

The To-Do Bar displays your tasks in *Compact Mode*, so you may not see all the fields unless you select 2 as the *Maximum number of lines in compact mode* at the top of the *Show Columns* dialog box.

When you have made all changes, click *OK*.

## **Sort the Tasks within Each Category**

Click the *Sort* button on the *Advanced View Settings: To-Do List* dialog box and select *Due Date (Ascending)* from the *Sort items by* drop-down menu. Select *Priority (Descending)* from the first *Then by* drop-down menu. Then click *OK*.

## **Filter Completed Tasks**

Select *Filter* from the *Advanced View Settings: To-Do List* dialog box and click on the *Advanced* tab. Click the *Field* button and select *Complete* from the *Frequently-used fields* list. Make sure that *Equals* is selected for *Condition* and *No* is selected for *Value*. Then click the *Add to List* button and *OK*. Click *OK* in the *Customize Current View* dialog box and your *To-Do Bar* is set up for TASK-it.

Your customized settings will apply to the *To-Do Bar* wherever you choose to use it (in *Mail*, *Calendar* and/or *Contacts*).

## **The Outlook Calendar's Daily Task List**

At the bottom of your daily calendar is the *Daily Task List*, which allows you to display tasks at the bottom of your daily calendar. This feature is of minimal help because of the limited customization options. To display the *Daily Task List*, click the *View* tab in the *Ribbon* in *Calendar* and then select *Daily Task List* from the *Layout* section of the *Ribbon*. Select *Normal* to display your tasks at the bottom of your daily calendar. Select *Arrange by* to choose whether you want to display tasks by *due date* or *start date*, and whether to display completed tasks.

Although you can't arrange tasks by category, each task is displayed in the color of the first category assigned. If you elect to display the *Daily Task List*, you can click the directional arrow button on the top line to minimize or restore the list.

The *To-Do Bar* and *Daily Task List* can be helpful tools in allowing you to integrate a view of your tasks into the *Mail*, *Calendar* and *Contacts* functions of Outlook 2010.

## Chapter Ten: Getting All Your Tasks into TASK-it

*"I know the price of success: dedication, hard work, and an unremitting devotion to the things you want to see happen."*

*- Frank Lloyd Wright*

Now that your TASK-it system is up and running, your challenge is to get all your tasks into the system. The faster you can accomplish this project, the better. But effective use of TASK-it requires more than just getting tasks into the system. It requires a different way of *managing your things*.

### ***Managing Your Things***

Everyone has *things*. Some people focus their entire lives on the accumulation of things, only to give them all up in the end, because you can't take them with you. But during your life, things do play a major part in your activities, your occupation and your *preoccupation*. Much of the stress we experience is due to our mind's preoccupation with *things*. Every *thing* you bring into your life adds to the clutter and to the maintenance you must perform.

If you buy a sailboat, for example, you may have a really great *thing*, but you must consider all that it takes to manage that *thing*. Where will you keep it when you're not sailing? What kind of registration will be required? Will you have to pay personal property tax on it each year? What kind of maintenance will you have to perform on the boat, sails and other gear? The tasks required to maintain a sailboat should be considered along with the rest of your buying decision criteria.

Tasks are inherent in every *thing* you own or manage. Those tasks aren't always immediately apparent, but your mind tries to consider them, and often gets overwhelmed in the process. TASK-it will take relieve your mind of the burden of task management. But this is only possible if you learn how to effectively manage your things by organizing them and entering their inherent tasks into TASK-it.

Figure 10-1 below is the *Managing Your Things* flowchart, and it depicts the process for managing your things while entering their inherent tasks into TASK-it. You will use this in the process of entering your existing tasks into TASK-it, and you will continue to use the process on an ongoing basis as new *things* enter your life.

The concept is simple. You pick up a thing from your inbox or from one of the piles on your desk, and you ask this question, "Is action required?" If the answer is no, you ask a second question, "Do I need it?" If the answer is *no*, toss it. Why over-burden yourself with things you don't need?

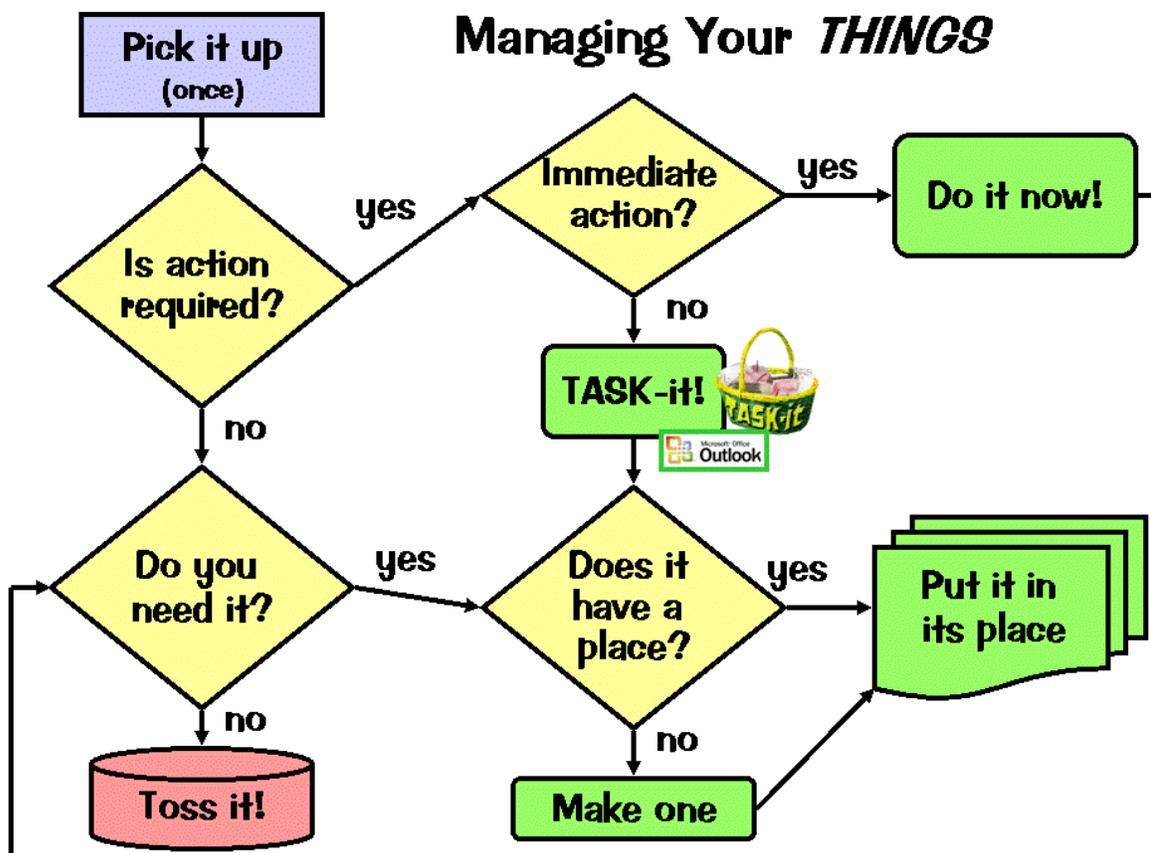


Figure 10-1: Managing Your Things flowchart

If the answer to the "Do I need it?" question is yes, then ask the question, "Does it have a place?" The assumption here is an important one: Managing *things* means

“A place for everything and everything in its place.” This motto is absolutely essential for effective *thing management*. So if the answer is *yes*, put the thing in its place. If the answer is *no*, make a place for it and then put the thing in its place.

The track through the flowchart that we just discussed is what you will do when the thing you pick up has no inherent tasks. This is determined by the answer to the question, “Is action required?” When the answer is *no*, there is no inherent task, and there is nothing to enter into TASK-it.

If the answer is *yes*, there is at least one inherent task. The next question you will ask yourself is “Does it require immediate action?” If the answer is *yes*, then *do it now*. No need to enter it into TASK-it because if you do it now, the task is done. Then ask the question, “Do I need it?” and either toss it or put it in its place.

Here’s where TASK-it comes in. If the answer to the question “Is immediate action required?” is *no*, then enter the task into TASK-it. Then ask, “Does it have a place?” and put it there.

Papers need to be filed. Things need to be put in their places. Some people keep them stacked in plain view as a reminder that there are tasks associated with the papers and things, and these tasks need to be done. This is an extremely inefficient task management system. Extract the tasks, enter them into TASK-it and put the things away!

If you follow the process outlined by the flowchart, you will make effective use of TASK-it, and your things will be effectively managed. So to get started, it’s time to catch up on your unmanaged *things* and your undone tasks.

### **Your “Enter All Tasks” Project**

The best way to get going with *task* and *thing* management is to set up an *Enter All Tasks* project. Don’t just think about it, *do it*. Begin now, by setting up the project, *P: Enter All Tasks*. In setting it up, enter the following tasks:

- P: Enter All Tasks – Jumpstart
- P: Enter All Tasks – Physical Inbox
- P: Enter All Tasks – Outlook inbox
- P: Enter All Tasks – From My Desk
- P: Enter All Tasks – From My Workspace
- P: Enter All Tasks – From My Home
- P: Enter All Tasks – From My Head

If you can dedicate the next few days to completing this project, do it. If you can't, make it a priority and do it as quickly as you can. Until you complete this project, you haven't completed your transition to TASK-it.

### ***Enter All Tasks – Jumpstart***

Start your project with a 30-minute *Jumpstart* task. I've outlined six additional tasks for the project, based on obvious places to look for tasks. When you actually do your jumpstart task, decide which of the remaining tasks you will tackle next and assign an appropriate *due date*. Use the rest of your 30-minute Jumpstart session to create additional tasks for any other task sources you can think of. Don't overlook closets, drawers, cabinets, bookshelves and storage rooms.

If you plan to include your personal tasks (which I highly recommend), create tasks for obvious locations at home, including your home office physical inbox, desk, bookshelves, closet, floor, etc. Then consider the rest of the house and all the undone projects you've been thinking about. Create tasks associated with physical locations including each room of your house, your attic, garage and yard. You may also want to create tasks corresponding to specific areas of interest, such as Art, Music, Golf, Fishing, Health, etc. The idea is to create a task for any possible area where potential tasks may be hiding. As you complete these tasks, other task areas may come to mind. As they do, create additional tasks in your *Enter All Tasks* project.

### ***Enter All Tasks – Physical Inbox***

If your physical inbox is piled high with papers and other incoming *things*, make your inbox the next task after your *Jumpstart*. Since a task is something you complete in a single session, don't turn this task into a project by pondering each inbox item or attempting to do it (unless it is absolutely necessary to do it now). Use the *Managing Your Things flowchart* (figure 10-1) to guide you through the process.

If you are unable to complete this task in a single session, make sure you scope the size of the remaining task(s) and enter it (or them) into TASK-it immediately. Part of the skill of effective task management is the ability to accurately estimate how long it will take you to complete a task. You'll get better at this skill with experience.

## Enter All Tasks – Outlook inbox

Your Outlook inbox is not a task list. It's a collection of *unmanaged things*. If you are like many Outlook users, you have hundreds or even thousands of old emails in your inbox. This is a highly ineffective way of using Outlook. Now that you have TASK-it, you can change your ways.

To help you manage your Outlook inbox, I've provided a second flowchart, specifically for this purpose (figure 10-2). Use the *Managing Your Email* flowchart to quickly go through your Outlook email inbox, deleting or filing each email as you go.

Deleting emails you don't need is easy. Just place your cursor on the item and click the *X* on the toolbar or press the *Delete* key. The place for processed emails is not your Outlook inbox, so if you don't have a place for them you'll need to create a place.

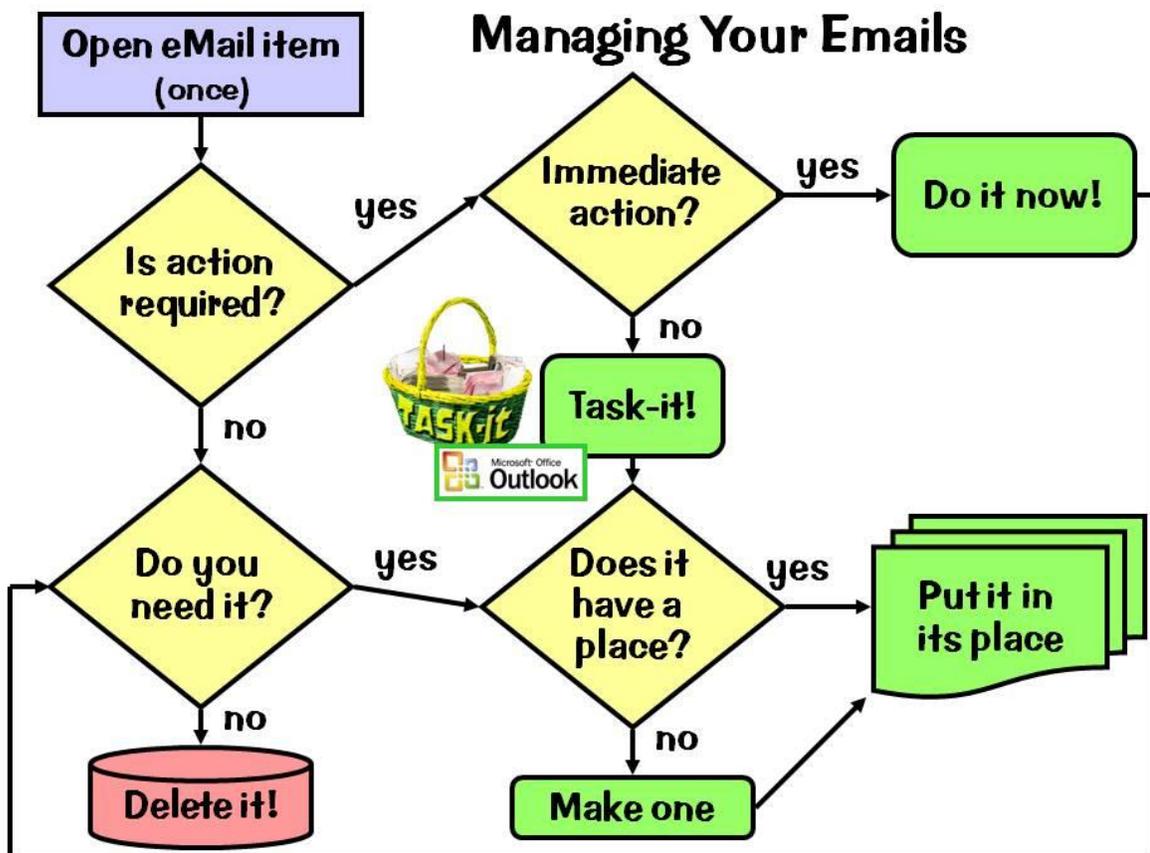


Figure 10-2: Managing Your Emails flowchart

The best place to file processed emails is within appropriately named subfolders. If you are using Microsoft Exchange and have a limit to the number or volume of emails you can save on the Exchange Server, this will eliminate the frustrating problem of running out of space. You will create your email subfolders within an Outlook Personal Folder (.pst file) on your computer's local hard drive.

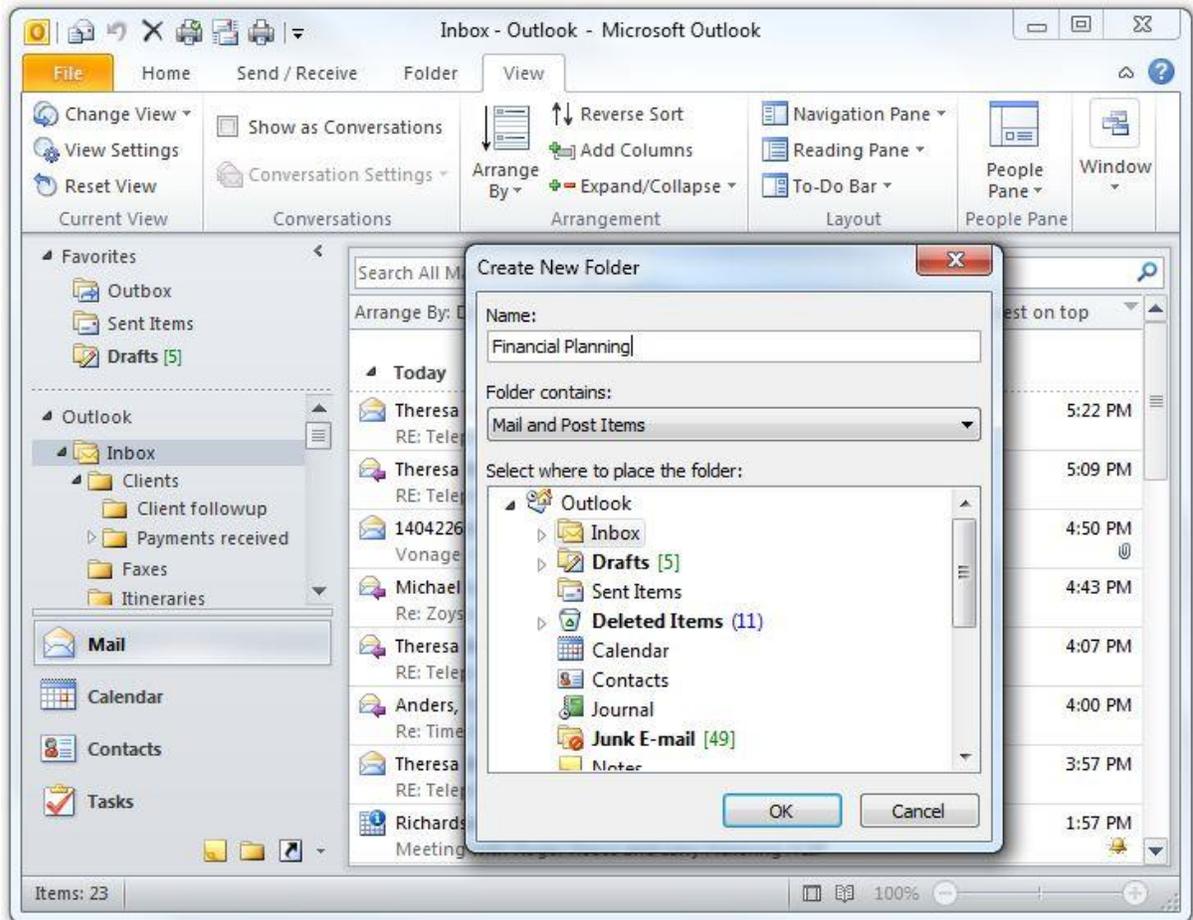


Figure 10-3: Creating an email subfolder

If you are using Outlook as a standalone system, you aren't using an Exchange Server, and all your Outlook files are already being saved in a *Personal Folder*. In either case, you can create your subfolders by clicking on the *Folder List* button or icon at the bottom of the *Navigation Pane*. This displays all your Outlook folders. To create a subfolder, right click on the *Inbox* folder under your *Personal Folder* and select *New Folder*. Then enter the folder name in the *Name* field. Make sure *Mail and Post Items* is selected in the *Folder contains* field and click *OK*.

Now, to move an email item from your inbox into its new place in the appropriate subfolder, just drag the item into the folder in the *Navigation Pane*. Having

everything in the right place will make email management much easier, and if you don't remember where you filed an email item it's not a problem, because you can use the search feature to search all your folders and find the email with lightning speed. To set Outlook Mail to search all mail folders as the default, click in the search window at the top of your *Mail* view. This displays the *Search Tools* tab in the *Ribbon*. Select *Search Tools* in the *Options* section of the *Ribbon* and then select *Search Options*. In the *Results* section of the dialog box, select *All Folders* and then click *OK*. If you're using the Windows 7 or Vista, that's all you need to do. If you're using Windows XP, you'll need to download and install the free Microsoft utility, *Windows Search 4.0*. This utility gives you the fast context search capability that is built into Windows 7 and Vista.

If it makes you nervous to move your emails out of your familiar inbox into a new and unfamiliar location, do it anyway. Any new process will feel unfamiliar at first. This new process for managing your emails will give you a feeling of freedom and accomplishment, especially when you finally get the item count in your email inbox down to zero. Keep it there. The only reason to have any items in your inbox is because you haven't read (processed) them yet. Actually you don't need to read an email to process it. You can usually tell by the *Subject* and *From* fields whether you want the email or not. Learn to delete your junk mail quickly. Then use the *Managing Your Email* flowchart to make email management a breeze.

Remember, you can drag any email that contains an inherent task to the *Task* button or icon in the *Navigation Pane* to convert it into a task. Just change the *Subject* line, adjust the fields appropriately and tag it with the appropriate category (or categories). Your email item remains in your inbox after you create a task, so don't forget to delete it or file it in a subfolder to process it completely.

### ***Enter All Tasks – From My Desk***

Some people use *Pile Management* techniques to manage things and tasks. Now with TASK-it and the *Managing Your Things* flowchart, you can eliminate your piles and effectively manage the tasks that are hiding within. Your *P: Enter All Tasks – From My Desk* task includes cleaning out your desk drawers. If this is more than you can do in one session, break it down into smaller tasks and go for it!

### ***Enter All Tasks – From My Workspace***

Once you've processed your inbox and your desk, it's time to go through the rest of your office or cubicle and put everything in its place while extracting the inherent tasks and entering them in TASK-it. Don't leave any stone unturned.

## ***Enter All Tasks – From My Home***

You may have piles of work in your office at home. After you finish with your office, process all your work-related tasks in your home office and in the rest of your house or apartment. Don't forget to include your personal tasks. This will probably require you to break this task in to a number of smaller, more manageable tasks.

## ***Enter All Tasks – From My Head***

Finally, last but not least, it's time to deal with the tasks stored in your head. By this time, you've already cleared quite a lot from your head, because your brain has been in the habit of trying to manage all the tasks in your office and home. Now that most of them have been entered into TASK-it, your mind is much clearer so you can deal with the task at hand, whatever it may be.

But there are still a lot of tasks in your head. This task is a brainstorming session, during which you will try to bring any remaining tasks to mind and enter them into TASK-it. Use the *Managing Your Shoulds* flowchart (figure 10-3) to help you through the process, and the ongoing process of keeping your head clear.

Your mind is very good at generating *Shoulds*. *Shoulds* are thoughts about what you *should* do. These thoughts don't just come at the time when you need to perform the task. They're generated at random, and often in large numbers, so you feel overwhelmed by the sheer volume of all you have to do.

Now that you have TASK-it, you don't need to be driven by *shoulds*. You can effectively manage all your tasks through your highly effective external support system. Any time your mind assaults you with *shoulds*, refer to the *Managing Your Shoulds* flowchart.

Listen to each *should* only once. Ask the question, "Is action required?" If the answer is *no*, ask yourself whether it's important. If the answer is *no*, then just *forget about it*. If the *should* returns to haunt you, ignore it. If you aren't used to ignoring your unimportant *shoulds*, it's a valuable skill to learn. Some people think they've mastered this skill through *procrastination*. Unfortunately, the procrastination habit is often the source of your *shoulds*. When you follow the *Managing Your Shoulds* flowchart, you're managing your responsibilities and ignoring the mind's worthless chatter.

If action is not required, but it's important, then maybe your *should* is actually an *idea* or a *goal*. If so, enter it into TASK-it. If the *should* returns, ignore it, because now the idea or goal is being managed by your external support system.



Figure 10-4: Managing Your Shoulds flowchart

If you ask the question, “Is action required?” and the answer is yes, ask yourself if immediate action is required. If the answer is yes, do it now, and you’re done. Forget about it.

If action is required, but not immediate action, enter into TASK-it and then forget about it. It’s now under the management of your external support system.

This process is guaranteed to relieve stress and get things done more efficiently than your old *should*-powered system could ever do. Now use TASK-it and the *Managing Your Shoulds* flowchart to get the tasks out of your head and into your system.

## Chapter Eleven: Creative Tips for Task Input

*“They say that time changes things, but you actually have to change them yourself.”*  
- Andy Warhol

Once you’ve completed your *Enter All Tasks* project from Chapter 10, all you have to do is ongoing new task input and maintenance through daily and monthly task reviews. You’ve learned how to input a new task. Below are tips for a variety of creative ways of getting tasks into TASK-it

### ***Creative Tips for Task Input***

Some of these tips were outlined in Chapter 4, but this section will give you a full list of input options:

- ***Create a task from an Email item.*** While in *Outlook Mail*, drag the email item to the *Task* button or icon in the *Navigation Pane*.
- ***Create a task from a Calendar item.*** While in *Calendar*, drag the calendar item to the *Task* button or icon in the *Navigation Pane*.
- ***Create a task from a Contacts item.*** While in *Contacts*, drag the contact item to the *Task* button or icon in the *Navigation Pane*.
- ***Create a task from Windows Explorer or My Documents.*** If you’d like to create a task from *Windows Explorer* or *My Documents*, drag the file to the *Task* button or icon in the *Navigation Pane* within an *Outlook* window and *Outlook* will open a task with your file already inserted in the notes field as an attachment.

- **Create a task from your smartphone.** Use the Outlook Sync feature of your Android, iPhone, Blackberry or other smartphone. If Outlook Sync isn't a standard feature, do an Internet search for a third party Outlook Sync utility that works with your mobile device.
- **Create a task from your Tablet PC.** Use Microsoft OneNote to take handwritten notes with drawings, and convert your notes to an Outlook Task.
- **Create a task from your digital audio recorder.** Most digital audio recorders save files in MP3, WMA, WAV, or other formats that can be played on a PC. Make audio notes about your ideas, goals, projects and tasks and copy them to your PC and attach them to Outlook tasks. Since many smartphones include voice recording as a standard feature, this process is streamlined with Outlook Sync.
- **Create a task from a voice mail.** With services such as CallWave, you can add a free digital voice mail service to your home or cell phone (and possibly to your work phone) that will automatically send your voice mail message as emails with voice attachments. When you receive your message in your email, just drag the item to the Task button or item in the Navigation Pane to create a task.
- **Create a task from any phone.** Use the same feature noted above to call yourself from any phone and record a task using your voice mail. Then convert the email to a task when you receive it in Outlook later.
- **Create a task from an existing hard copy.** If you have an existing document and an inherent task associated with it, use a desktop scanner to scan the document and attach it to a task.
- **Create a task from a fax.** Many companies use fax servers that deliver faxes as emails. I receive all my faxes as emails through the free fax-to-email service offered by eFax. I often create tasks from faxes received as emails, by dragging them to the *Tasks* button in the Outlook *Navigation Pane*.
- **Create a task from Web content.** Right click on the Outlook toolbar and select Web to open the Web toolbar. This toolbar allows you to do Web browsing from anywhere in Outlook. Just use the Web toolbar as your browser. If you find an article you'd like to use as the basis for a task, highlight and copy it, then click the *Tasks* button and open a task. Then paste your Web text into the *Notes* field of the task.
- **Create a task from your notepad.** This may seem obvious, but if you don't have your smartphone with you and you want to enter a task, use a notepad or a napkin initially, and enter it into TASK-it at your earliest convenience. You're not trying to work from stray notes and napkins. You're working from TASK-it, but using a temporary means of getting the task out of your head as quickly as possible.
- **Create a task while you're in the shower.** A participant in one of my recent time management workshops told me about a white board for your shower. I bought one immediately after the class. It's great! If you get great ideas in the shower, don't take the chance of forgetting them. Write them down while you're in the shower and then transfer them to TASK-it at your earliest convenience.

- **Create recurring Tasks.** If you have routine tasks that you have to do daily, weekly or monthly, create recurring tasks to have these tasks generated automatically. See Chapter 4 for instructions on creating a recurring task.

Discover your own creative techniques for getting ideas, goals, projects and tasks into your TASK-it system!

## Chapter Twelve: Staying Committed

*“This loving person is a person who abhors waste--  
waste of time, waste of human potential. How much  
time we waste. As if we were going to live forever.”*

*- Leo Buscaglia*

TASK-it will grow on you. As you use it, your ideas will grow and expand, you'll become more goal-oriented, and you'll accomplish more than ever before. You'll grow to rely on your external support system as it helps you to keep your commitments and manage the details of your work and personal life.

### ***Moving Past the Dips: Making TASK-it a Habit***

In spite of all that, you will occasionally find yourself in the “*dip*” state, as I mentioned in the introduction to this book. My recommendation is to simply *stay committed*.

If you notice that you haven't been using the system, don't use that as an excuse to chuck it. Just start using it again. When you catch yourself writing a task on a sticky note, just stop it and enter it into TASK-it. Even if months go by during which you haven't used the system at all. Just go back and pick up where you left off. Sooner or later your subconscious mind will realize that TASK-it is here to stay. If you refuse to stop using it, your new system will replace your old one and it will become a habit.

### ***The Revolution and the Evolution of TASK-it***

For most people who implement it, TASK-it is a revolutionary approach to task management compared to their former methods of getting things done. Because of Outlook's flexibility, you can continue to adapt TASK-it to your work style by evolving

your configuration as you go along. You'll discover new features hiding within Outlook that can make your task management efforts more effective.

Challenge yourself with new technology from time to time. If you don't currently use a PDA or smartphone, maybe TASK-it will be the impetus you need to take the leap into mobile computing. If you're considering a new laptop, maybe a Tablet PC is the right choice. The scope of the benefits you will derive from TASK-it is only limited by your creativity in evolving its use to fit your needs.

As long as you live, there will always be more to do. Commit yourself to doing the right things and doing them well, and commit yourself to a system that supports you in your efforts. Good luck!