



3 Steps to Take Charge of Your To Do List

Make your to do list work for you

Why, How, & When

Three building blocks to an effective to do list.

1. Organize your work.
 - Know *why you're doing it* and roughly in which order.
2. Estimate how long it'll take.
 - Understand *how much time you have* each day and *how long it'll take*.
3. Plan your week.
 - Plan your week so you know *when to do your tasks*.

#1: Organize Your Work

Tasks go into three large
buckets: Active, Inbox, Backlog.

- *Active*: The work we're doing this week.
 - Fully categorized, prioritized, estimated, and scheduled.
- *Inbox*: All new requests go here.
 - No sorting necessary. Dump and go.
 - Items from here go into the Backlog to be sorted at planned intervals.
- *Backlog*: Items ready for the future.
 - Most items are categorized, prioritized and estimated.
 - Not scheduled.
 - Items from here are used to populate the Active bucket.

#1: Organize Your Work

Categorize and roughly
prioritize the tasks.

- Categorize the work with easily identifiable labels. E.g. Client names, project titles, or personal goals.
- Add a priority level: Critical, Important, Nice to Have.
- Roughly prioritize the tasks.
 - *Critical* tasks go towards the top of the list.
 - *Nice to Have* tasks go to the bottom.
 - Tasks required to be completed before others can begin, go towards the top.
 - Smaller, quicker tasks can go between larger ones.
 - Tasks with closer due dates take precedence over no dates or *Nice to Have* tasks.

#2: Estimate How Long It'll Take

Quantify effort and availability so we can schedule an achievable week's worth of work.

I use a points system inspired by the Agile methodology and the Pomodoro technique.

- Pomodoro is the practice of working for a focused 25 minutes, then take a 5 minute break. At the end of the 4th session you take a longer break.
- One 30 minute session (25 minutes working + 5 minute break) equals one point.

#2: Estimate How Long It'll Take

Score each task by how much effort or length of time you think it will take.

E.g. Things that take a small amount of effort and get done in about 30 minutes are worth one 1 point.

- Small (about 30 minutes) = 1 point.
- Medium (about 60 minutes) = 2 points.
- Large (longer than 2 hours) = 4 points.
- Create labels: *Small, Med, Large*.
- If you think the task will go across multiple days, or will take much longer than 2 hours, break it down into smaller pieces.

#3: Plan Your Week

Plan your availability.

In a typical day, 75% of the time is spent working on tasks and 25% is on emails and other admin activities.

- E.g. In an 8 hour day, 2 hours (25%) is admin and 6 hours (75%) is for tasks.
- 6 hours equals 12 points.
- Meetings count towards the 75% availability.
- Emails and admin count towards the remaining 25%.
- Depending on how your company schedules your time, these percentages may shift.

#3: Plan Your Week

Plan the week's work around pre-scheduled meetings or other important events.

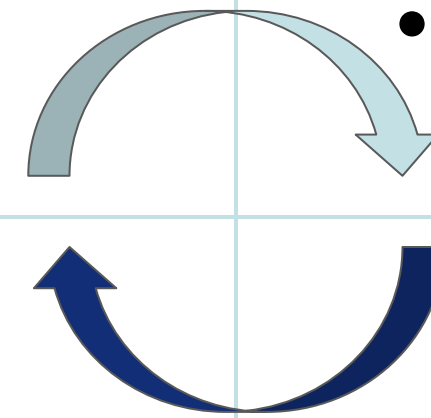
- Planned meetings count towards the daily total. A 30 minute meeting is 1 point, an hour long meeting is 2 points.
- Prioritize with your most important tasks at the beginning of the week and the lowest priority at the end.
- The total points for tasks and meetings for each day should equal your daily total. E.g. An 8 hour day with a total of 12 points.
- Create a label for each day of the week and add it to your tasks for that day: E.g. *Mon, Tues, Wed, Thurs, Fri.*

Step #1: Categorize the work.

- Add labels for: Clients, Projects, Goals.
- Add priority levels: Critical, Important, Nice to Have
- Roughly prioritize the tasks.

Step #2: Define the amount of effort & score your tasks.

- Small (about 30 minutes) = 1 point.
- Medium (about 60 minutes) = 2 points.
- Large (longer than 2 hours) = 4 points.



Tips:

- Create an achievable plan for the week.
- Colour code the labels for easy visual reference.
- Use labels for easy sorting.
- Plan next week's work on a Friday afternoon.

Step #3: Plan your week.

- Plan the work to do during the week based on daily point totals.
- Spread tasks across the week, with the most important at the start of the week.
- Meetings count towards daily totals.

Example

[Task description]

[Priority Level] | [Category] | [Effort] | [Day]

I work an 8 hour day, and on Monday I have 2 ½ hours of meetings, a quote for Sally and video content to create.

- Meetings = 5 points
- Quote for Sally = 4 points
- Video content = 3 points

Create quote for Sally

Critical | Sally | Large | Mon

Record “Be Helpful, Get Engagement” video for LinkedIn

Important | LinkedIn Videos | Med | Mon

Add captions and edit “Be Helpful, Get Engagement” video

Important | LinkedIn Videos | Small | Mon

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