

Conquering the Information Deluge -- Handling Tasks & Appointments

By Joy-Ellen Lipsky, *Success with Joy!*

The ability to manage tasks, goals, projects, and appointments is the master skill of highly productive individuals. Not only do we need to manage these, but with PDAs, laptops, desktops, and paper, we need to ensure our various planning tools are in sync.

The ability to locate information relative to your tasks and appointments is critical. Most of the information we gather tends to get lost, or we forget where we filed it. To become successful, you will need to manage your time and your action items. There are many time management books and courses out there. Take one if you haven't already.

Let's look at some tips to help us:

Handling Tasks

- Plan monthly, weekly, and daily:
 - For monthly planning, look to see when major due dates or events occur. Make sure there are tasks in your list to accomplish these.
 - For weekly planning, decide what the most important items in your personal and professional life need to be completed. Schedule blocks of time in your appointment calendar to accomplish your tasks.
 - For daily planning, account for any action items that may have been created through meetings, email, phone calls, etc. Make sure they are in your system. Decide what the most important use of your time is today -- prioritize your tasks accordingly. You can use the popular "A, B, C" technique, or merely assign your tasks numbers -- from 1 to N. You may wish to color code those that **must** be completed today.
- Track the status of your tasks. Don't allow tasks to be forwarded multiple times or wait endlessly for input from someone else. If a task will take multiple days to complete, put it on the task list of the days you can work on it, and block time in your calendar. Use the recurring feature of your software, and turn on the reminder for the due date.
- Note where the background information for your task lives. For online systems you can add notes to indicate where info can be found or, if it is short, it can be pasted in.
- For online systems, create and display tasks by categories. These categories will allow you to group your action items by personal or project areas. If your system allows, you might want to color code these as well.
- Filter your online tasks, e.g. only show those tasks that are scheduled to start or are underway.

- If you are using a paper planning system, you need to have your planner with you in your office, at meetings, or anywhere where you could pick up a task or appointment.
- When entering a task into your PDA or PC:
 - Categorize it
 - Enter the begin and end dates, if known
 - Set recurring dates, if appropriate
 - Use the notes section to add relevant background information or to point to where this information can be found
 - Make appointments with yourself to complete the task
 - If you are going to delegate, use the delegation feature to forward the task. It will automatically send it to the person to whom you have delegated it.

Handling Appointments

- Keep your schedule current -- enter appointments in as they are created. Be sure to account for any appointments made during meetings, phone calls, email, etc.
- Use your planning software's meeting planner to schedule meetings. Check others' schedule to see if they are available. Include the location of the meeting, and update later with the meeting agenda and background information.
- Note in your schedule if you will be out of the office, and update your phone and email "out of office" message accordingly
- Turn on an appointment reminder.

Keeping Everything in Sync

- Decide which device is your "hub" -- the one place where information is updated/stored.
 - I suggest your PC (desktop or laptop) as your hub -- it is easier to input and view information on
 - Your PDA is your PC extension when out of the office. Get wireless access to your information.
 - Your paper planner becomes a reference tool, and source of tasks and appointments gathered during meetings, email, phone calls, etc. This information must then be transferred to your PC.
- When you come into your office, place your PDA into its connection cradle, and immediately sync it with your PC. Input any tasks or appointments from your paper planner into your PC planning system.

Once you get into the habit of ensuring your hub has all the task and appointment information, you will find yourself less stressed, less likely to forget items, and able to locate relevant information within seconds. If you are on time with your commitments,

other people will view you as a consummate professional in the business world, and as a caring person in your personal life.

Joy-Ellen Lipsky is a speaker, trainer, and technologist, whose success skills guide her clients in creating effective lives and organizations.

We offer this article on a nonexclusive basis. You may reprint or repost this material as long as Joy-Ellen's name and contact information is included: JELipsky@successwithjoy.com, Voice: 1.408.229.2697, FAX: 1.408.850.5859, <http://www.successwithjoy.com>

Copyright © 2002-2004 **Success with Joy!**