## Prioritizing Tasks

## Course Overview

## Welcome to Prioritizing Tasks.

After completing this course, you will learn some of the basic tools you can use to prioritize your daily tasks. You will learn how to rank your responsibilities by level of importance and time involved, as a way to organize your workload and decrease stress.

To learn the objectives for a lesson, place your cursor over a lesson title. To begin a lesson, click the lesson title.

## Working without Priorities

| Lesson Description or Objectives |  |
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| After completing this lesson, you will be able to: |  |
| $\bullet$ | See how working without prioritizing tasks can make work more difficult and raise your <br> stress level |


| Page | Content (Limit: 465 characters, or approx. 14 lines of text per page) | Visuals/Action |
| :---: | :---: | :---: |
| 1. | Voice over: <br> In today's competitive work environment, effectively managing tasks and their relative priority is a critical skill that can make or break a career. <br> Fortunately, effective management of tasks and priorities is a teachable skill that can be improved with regular practice. | Perhaps we can just have a collage of photos a pad with a list on it (doesn't have to be legible), a clock, the numbers $1,2,3$ and a person with a pad --fading in and out as the audio plays |
| 2. | Voice over: <br> Let's take Mary's typical workday, and see what a difference effective management of tasks and priorities can make. <br> Mary is a project manager for her company. She is responsible for attending meetings and completing project work assignments in addition to managing the project. | Show image of Mary and some images representing her role in the organization. <br> Fade out and then fade into the scenario scenes. |
| 3. |  | Show Mary coming in to work. There is a voice mail light blinking on her phone, and she has several emails to read and respond to. <br> The phone rings as she reaches for it to check messages. |
| 4. | Mary: Mary Williams. <br> *brief pause* <br> Mary: Hi, Richard. What's up? <br> *There is a pause as the other voice answers. You can't really understand what's said, but can hear it's a man's voice. Mary nods as he is talking.* | Show Mary answering the phone. <br> Fade out while Mary listens to Richard inform her about the project's crisis of the morning. <br> Before fading back in show " 15 minutes later" |
| 5. | Mary: Ok, Richard. I'll take care of it. | Show Mary writing down some notations as she speaks. <br> Mary hangs up the phone. As she does so another co-worker sticks his head into her workspace. |


| 6. | Kevin: Don't we have a status meeting this morning? | Mary looks up from the paper she is writing on when Kevin talks. |
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| 7. | Mary: Yep. Is it that time already? <br> Kevin: Actually we're already 5 minutes late. <br> Mary: We'd better walk quickly then. | Fade out as the two of them leave Mary's work space. |
| 8. |  | Fade in to Mary addressing a conference room full of people. Don't have to show people, but need to give a sense of her being in a meeting. |
| 9. | Mary: Sorry again for this running a bit late. I'll handle looking into the three issues we discussed. | Show Mary writing issues down on a pad (different than before) and hear the noise of the meeting breaking up. Fade out. |
| $\begin{aligned} & 1 \\ & 0 . \end{aligned}$ | Voice over: <br> Mary Williams please report to conference room A. | Fade in. Mary is talking with Kevin, a project team member when the page comes across. |
| $\begin{aligned} & 1 \\ & 1 . \end{aligned}$ | Mary: Oh no. What time is it? <br> Kevin: It's 1:30. <br> Mary: Sorry, but we'll have to finish this later. I have a client call to get to. | Show Kevin checking his watch. <br> Show Mary hustling down the hallway. |
| 1. |  | Fade in. It's now 3:30 p.m. in the afternoon. Mary is sitting at her desk looking discouraged. The voice mail light on her phone is still blinking. <br> Rose, one of Mary's work friends is also a project manager. She is a few years older than Mary and has been doing this job a few years longer. She stops by to chat and sees Mary looking down. |
| $\begin{aligned} & 1 \\ & 3 . \end{aligned}$ | Rose: Hey, how's it going? <br> Rose: You look like you're having a rough day. <br> Mary: I am. It started as soon as I walked in the door. Richard called as soon as I walked in this morning and ranted for 15 minutes about how the team isn't performing the way he thinks it should. <br> Rose: Richard and his concerns can be challenging. | Speaks as she enters and notices Mary's having a rough day. <br> Rose smiles. <br> Mary nods. |
| $\begin{aligned} & 1 \\ & 4 . \end{aligned}$ | Mary: And he kept me on the phone long enough to make me late to our project status meeting....which of course ran over because I was late starting it and didn't have a chance to prepare. <br> Mary: Then in the meeting I had a couple of issues come up which I still need to look into and get resolved. I haven't had time to do that because I was tied up on a client call for 2 hours. On top of which I haven't even checked e-mail or had lunch yet today! | Mary sighs. <br> Rose nods understandingly. |
| 1. | Rose: We've all certainly had those days. | She smiles at Mary. |


| 1. | Mary: And while I'm running like a crazy person handling all the issues with the project, I'm not working on my assignment... which due to all the other items I'm taking care of is now running behind. And I don't want to be the one who makes the project come in late or over budget. How would that look with me being the project manager? | Mary sighs again. |
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| 1. | Rose: I have to agree that wouldn't be the best scenario. <br> Rose: I'm sorry you're feeling so overwhelmed. <br> Mary: I notice you don't seem to be overwhelmed very often. What's your secret? | Rose pauses to put her hand on Mary's shoulder. <br> Mary looks up at Rose and smiles. Then looks at her a little more intently. <br> Rose looks thoughtful and pauses a moment before answering. |
| 1. | Rose: Well, quite honestly I used to have a lot of days like the one you're having today. But l've learned some techniques that help keep me in control of my day, and ensure that the most important things are handled. <br> Mary: Really? Would you mind teaching me? I think it would help me a lot. <br> Rose: Sure. l'd be happy to. Why don't you set aside an hour or so in the morning and we'll chat then. <br> Mary: Sounds good. Thanks! | Mary perks up as Rose is speaking. <br> Rose smiles as she answers. <br> Fade out. |

## Learning to Prioritize

| Lesson Description or Objectives |  |
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| After completing this lesson, you will be able to: |  |
| $\bullet$ | Define prioritization |
| $\bullet$ | Categorize your work tasks by level of urgency |
| $\bullet$ | Manage tasks based upon level of urgency and time required |


| Page | Content (Limit: 465 characters, or approx. 14 lines of text per page) | Visuals/Action |
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| 1. | Rose: Good morning! <br> Mary: Same to you. Today's already starting to get crazy, and I'm definitely ready to learn some techniques to help put me in charge of my day, rather than the other way around. <br> Rose: Sounds good. | Fade in to Rose coming into Mary's workspace. <br> Rose laughs. <br> They are interrupted by the phone ringing. Mary goes to reach for it, but Rose stops her with a hand on her arm. Mary looks questioningly at Rose. |
| 2. | Rose: Who is it? <br> Mary: It's Richard. <br> Rose: Are you aware of any emergency issues with the project? <br> Mary: None were mentioned in yesterday's status meeting. The few items that did come out are things that will have to be resolved in the next two weeks. <br> Rose: Ok. Then this is your first lesson. Don't be a slave to your phone. You can return this call later when you have planned time to do so. <br> Mary: Sounds good. | Mary takes a look at the caller ID display on the phone. <br> Phone still ringing. <br> Rose smiles as Mary finishes her response. <br> All quiet as the phone stops ringing. Mary looks a bit relieved. |
| 3. | Rose: Good! To begin taking charge of your day, you need to take some time each morning and evening to determine where all the things you are responsible for are at. Since we're starting this morning, let's just start with what you have on your plate for today. <br> Mary: Ok. Let's see...Today I have a status meeting with my boss, a conference call with the project vendor... <br> Mary: ...the three items I'm supposed to be researching from yesterday's team status meeting... | Mary stops and looks at the electronic calendar she has on her computer. <br> Mary pauses and rustles through some papers on her desk...find what she's looking for and pulls it on top. <br> She turns and pulls a different note pad from her desk. |


| 4. | Rose: Ok. Stop right there. <br> Rose: Next lesson. You'll never really know what you have to manage and prioritize until it is all in one place. Appointments, action items, to dos, etc. should all be together in a central location. <br> Mary: No wonder I feel so scattered sometimes. I never made that connection! <br> Rose: Yep. A lot of people don't, but it's something that really helps to keep you on top of everything you have going on. | Mary stops what she is doing. She looks surprised. Rose smiles reassuringly back at her. <br> Mary pauses, looking at the pad in her hands and the stack of papers on her desk, then at the computer. Then she laughs. <br> Rose smiles. |
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| 5. | Mary: So what do you use to keep everything in one place? <br> Rose: Well. That's a good question. It's usually a little different for everyone. Some people do it with a PDA, others use paper planner systems, and others use some combination of the two, like having their appointments on a PDA but carrying a notebook to write down new items they take on through the day. You'll have to experiment with what works for you, but the idea is that you go to one place to see everything that's on your plate. | Rose looks thoughtful as she answers. |
| 6. | Mary: Ok. l'll have to think on that one. <br> Mary: For now l'll just use this clean pad of paper so we can keep going. <br> Rose: Great. So now you want to write down everything you just mentioned - the two meetings, the three items you're researching, and whatever else you have going on. Make sure to put times for the meetings and due dates for the other items. | She pulls a clean pad of paper from her desk. <br> Fade out as Mary writes her list on the pad. |
| 7. | Rose: So let's see what you have. <br> Rose: Ok. Now that you have everything in one place, let's separate out the appointments from the other items, since they have specific beginning and ending times. | Fade in to the pad of paper. It has these items written on it: <br> Status meeting - 2-2:30 <br> Conference call - 3-4 <br> Research missing invoice - due in one week <br> Research vendor issue - due in one week <br> Research project software bug -due in one week <br> Preparation for status meeting - this morning <br> Complete project assignment - due in 7 days <br> Return Richard's phone call -- today <br> Project management responsibilities - ongoing <br> Fade in to Rose talking to Mary. Then fade out and back in on the pad. Now the tasks are on one side in a list and the appointments are on the other side in a list in order of appearance (so to speak) as they appeared above. Fade out. |


| 8. | Rose: Good. It's already 9:30 and you typically work until when? <br> Mary: I work 5 eights, so 5:30 <br> Rose: That leaves about 4.5 working hours for today once you take appointments out of the mix. That's assuming you are going to lunch and not working overtime. <br> Rose: Now what we're missing the relative priority of each task, and how much time you think you need to complete them. <br> Mary: But I already have deadlines on all of them. <br> Rose: True. However you don't know if you have a sufficient amount of working time between now and the deadlines to know if you'll be able to complete the task. You told me yesterday that you were behind on your project assignment. <br> Mary: Good point. | Fade in to Mary and Rose again as they chat. <br> She winks at Mary. <br> Mary looks a little chastened. <br> Fade out. |
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| 9. | Rose: Let's start by putting the tasks in priority order. | Fade back in to the task list. Animate the order shifting until it looks like the list below. <br> Preparation for status meeting - this morning <br> Return Richard's phone call -- today <br> Research missing invoice - due in one week <br> Research vendor issue - due in one week <br> Research project software bug -due in one week <br> Complete project assignment - due in 7 days <br> Project management responsibilities - ongoing <br> Fade out. |
| 1. | Rose: Now. Let's assign how long you think you'll need to complete each task. The estimates don't need to be exact, but they do have to be precise enough to allow you to adequately plan your time, and know when you are overtasked. <br> Mary: Ok. Let me see... <br> The meeting prep should take about a half hour... <br> Richard is always 15 minutes on the phone <br> Hmm. Looking into the invoice means l'll have to go to someone in receivables, so that will be at least 15 minutes... <br> The vendor thing is a phone call and some prep so that should take about a half hour... <br> The bug issue is going to take a meeting and some additional follow up...I'll say 45 min ... <br> Oh. And this was planned at 70 hours and l've only done about 20. I think the plan was close so l'd guess I have about 50 hrs left... <br> And the PM responsibilities. Hmmm... | Fade back in to Mary and Rose chatting. <br> Fade out and then back in to the pad and the list. Animate times coming in for each one as Mary talks. <br> Preparation for status meeting - this morning - 30 min. <br> Return Richard's phone call - today - 15 min . <br> Research missing invoice - due in one week - 30 min. <br> Research vendor issue - due in one week - 30 min. <br> Research project software bug -due in one week 45 min <br> Complete project assignment - due in 7 days -50 hours <br> Project management responsibilities - ongoing <br> Pause as you reach the last task. Then fade back into Mary looking at Rose with a confused look. |


| 1 1. | Mary: Ok. How do I handle the stuff that's ongoing...like the project management responsibilities? <br> Rose: How much time you estimate you spend on PM tasks on a daily basis? <br> Mary: Mmm. 1-2 hours. <br> Rose: Ok. Then instead of assuming you have 8 hours to handle your other tasks and appointments, you must always assume you won't have any more than 7 , and more likely somewhere around 6. <br> Mary: Ahh. No wonder l'm always falling further and further behind. I'm always thinking I have a full day, when I really don't. <br> Rose: Yep. It's a common problem people face when they have some tasks which are deadline driven and others which take time, but are ongoing. Now let's look at that list again. | Brief pause as Mary considers the question. <br> Show Mary with a somewhat astonished look on her face. Don't overdo it. We just want the lightbulb effect. |
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| 1. | Rose: Now that you have everything in priority order with estimated times and deadlines, what do you see? <br> Mary: That I'm in trouble. I have between 45 and 49 hours of working time in the next 7 days, not counting time I won't be available for appointments. And I have over 50 hours of work to do. <br> Rose: Don't worry. You're not terribly overextended yet. You now know that you have no additional bandwidth to take on new tasks in the next 7 days without something that's already on your list slipping. | Fade back in to the list. And the voices talking while it's still up. Animate the time adding up to 52.5 hours and reach the total about the same time Mary articulates that she is in trouble. <br> Show Mary looking a little panicked. Rose smiles at her in a reassuring way. |
| 1. | Mary: But l'm going to get additional items in the next 7 days. How do I handle that? <br> Rose: You can handle it in a number of ways. First, you can delegate items that are already on your list to someone that has the time to handle them for you. Second, you can re-negotiate the deadlines on some of the items you already have. For example, on the items you are researching is that a hard deadline or just when you said you'd have the answers? <br> Mary: Oh. That's just when I said I'd have the answers. | Mary still looks and sounds concerned. <br> Mary is now looking more relieved and a little excited. |
| 1. | Rose: Ok. So that's something you can take back to the team and renegotiate. You can, of course, always try to negotiate the deadlines for any new items you receive to be finished in a timeframe that's doable. <br> Mary: And what if none of those work? <br> Rose: Well. At that point you'd escalate the issue, and try to get the work reassigned. Or at least be sure that all your stakeholders know what deadlines are slipping and the impact of those slips. <br> Mary: Ok. That sounds reasonable. |  |


| 1 5. | Rose: But the best way to keep things from getting to that point is to keep your task list and schedule to a manageable point. Having 20 items on your task list and being booked in appointments non-stop for hours on most days is a recipe for problems. <br> Mary: Good advice. <br> Rose: Yep. So keep your daily task list down to 5-6 items, or however many you can realistically work on or complete that day. On days where you have lots of appointments, the list will have fewer items. | Mary smiles. <br> Fade back in to the list. |
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| 1. | Rose: Once you have your list prioritized and know your time commitments you'll just want to track your tasks. Here's the method I use. When I finish an item, I check it off. <br> Rose: If the item gets rolled over to tomorrow's list I put an arrow to show that it was pushed forward. <br> Rose: If the item is something that I'm in the process of completing, I typically mark it with a dot so I know some attention has been given to it. <br> Rose: Items that are either reassigned or delegated I mark with an $X$ to show that I don't have to worry about them anymore. | Animate the prep task being checked off and then the checkmark fading away. <br> Animate one of the research items marked with a $\rightarrow$ to show it being pushed, and then that fading out. <br> Show the longer task of completing project work being marked with a dot. <br> Animate one of the items being marked with an $X$ and then the $X$ fading back out. <br> Fade out on the list and back in to Mary and Rose talking. |
| 1. | Mary: Sounds pretty straightforward. <br> Rose: It is. You don't have to use my notations necessarily, but do choose notations that are simple, easy for you to understand and use consistently. <br> Mary: Sounds good. I can do that. <br> Rose: And that's about it. You'll want to spend a little time at the beginning and end of each day managing your tasks and schedule, but the time is well worth it. <br> Mary: Thanks so much for showing me this. I think it will really help! <br> Rose: I know it will! | Rose smiles. <br> Mary nods. <br> Mary smiles. <br> Rose smiles back. <br> They laugh. Fade out. |

## Working with Priorities

| Lesson Description or Objectives |  |
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| After completing this lesson, you will be able to: |  |
| $\bullet$ | See how the prioritization methods you have learned simplify work and increase <br> productivity |


| Page | Content (Limit: 465 characters, or approx. 14 lines of text per page) | Visuals/Action |
| :---: | :---: | :---: |
| 1. | Mary: Let's see what I have on the agenda for today. | Show Mary coming in to work. There is a voice mail light blinking on her phone, and she has several emails to read and respond to. <br> The phone rings as she reaches for it to check messages. <br> She doesn't answer it. Instead she checks her list of appointments and things to do. <br> Fade out. |
| 2. |  | Fade into the pad. It already has the items that were "rolled over" from yesterday. They are: <br> Research missing invoice - due in one week - 30 min. <br> Research vendor issue - due in one week - 30 min. <br> Research project software bug -due in one week 45 min <br> Complete project assignment - due in 7 days -50 hours <br> Project management responsibilities - ongoing |
| 3. | Mary: Ok. I have a meeting with one of the team members at 10 that I think will be about 30 minutes. And I have a conference call this afternoon from 1-2. And a team status meeting this afternoon at 3 . | As Mary talks show the following items appearing in the appointment column. <br> 10-10:30 meeting with team member <br> 1-2 conference call <br> 3-3:30 team status meeting |
| 4. | Mary: I need about 30 minutes to prepare for the conference call and 15 minutes to prepare for the status meeting. | As Mary talks show the following items appearing in the task column in addition to the other items so that it shows like this: <br> Research missing invoice - due in one week - 30 min. <br> Research vendor issue - due in one week - 30 min. <br> Research project software bug -due in one week 45 min <br> Complete project assignment - due in 7 days -50 hours <br> Project management responsibilities - ongoing <br> Prep for status meeting - 15 min <br> Prep for conference call - 30 min |


| 5. | Mary: Obviously the preparation items have to happen today....and I think I need to bump up the project assignment on the list. I'll try to get an extended deadline for the research items at the status meeting this week. | As Mary talks show the list animating to rearrange in the manner she describes. The end result looks like this: <br> Prep for status meeting - 15 min <br> Prep for conference call - 30 min <br> Complete project assignment - due in 7 days -50 hours <br> Research missing invoice - due in one week - 30 min. <br> Research vendor issue - due in one week - 30 min. <br> Research project software bug -due in one week 45 min <br> Project management responsibilities - ongoing <br> Fade out of the list and back into Mary in her workspace. As she finishes a co-worker pokes his head into her space. |
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| 6. | Richard: Hey there, I just called and thought I must have missed you. <br> Mary: Hi Richard. What can I help you with? <br> Richard: Well. I have some concerns about the project that I'd like to chat with you about. <br> Mary: Sure thing. Unfortunately, I am already booked up this morning. But I can offer you some alternatives. You can bring your concerns to our team meeting this afternoon. That way you can get the team's input as well as mine. Or we can schedule a meeting for tomorrow. Whatever you prefer. <br> Richard: Oh. Well l'll just bring those to the meeting then. <br> Mary: Great. I appreciate you doing that. <br> Richard: Yep. Thanks. | Mary looks up and smiles as Richard walks in. <br> Mary nods as Richard speaks... and smiles as she answers. <br> Richard looks like a light bulb has gone off. <br> Mary smiles. <br> Fade out as Richard leaves Mary's workspace. |
| 7. | Mary: Better go. I don't want to be late for my meeting with Kevin. | Fade in. Show Mary working at her desk. The message light on the phone is not blinking and her e-mails have all been read. She stops and checks her watch. <br> Fade out as Mary leaves her space. |
| 8. | Kevin: I thought you'd be happy to hear all this. The software bug issues wasn't as big of a deal as we thought. In fact, with the workaround we've come up with I think the item you were going to research can be put on hold unless something else happens. <br> Mary: That is great news. Sound to me like the vendor issue is more problematic than we first thought though. I'll bump that up on my priorities and see if I can get it resolved by tomorrow. <br> Kevin: That would be great. Thanks! | Fade in to Mary and Kevin chatting, though they are wrapping up. Kevin is speaking enthusiastically. <br> Mary smiles as she answers. <br> Kevin looks relieved. <br> Fade out as Mary leaves Kevin's workspace. |


| 9. | Mary: Ok. One item off, but another that's moved up in priority. | Fade in as Mary returns to her workspace and reorganizes her list. Animate it to re-organize as shown, including the addition of the checkmark and the x .. <br> $\sqrt{ }$ Prep for status meeting - 15 min <br> Prep for conference call - 30 min <br> Research missing invoice - due in one week - 30 min. <br> Complete project assignment - due in 7 days -50 hours <br> Research vendor issue - due in one week - 30 min. <br> X Research project software bug -due in one week - 45 min <br> Project management responsibilities - ongoing |
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| 1. | Mary: I'll be happy to look into that if you need me to, but if I add that to the priority items I have to look into for the project and the work I'm doing on the project, one of those will take a hit. Does it have to be this week? <br> Mary: Ok. I'll have that put together for you in the next two weeks. <br> Thanks! <br> Mary: I'd better get that onto my list... | Fade in to Mary's desk again. The phone rings and it's her boss. She listens for a few seconds as he speaks. You can't hear the detail of what's said, only that it's a man's voice. <br> Mary listens to the reply. <br> Fade out as Mary hangs up the phone. Fade back in to the list animating the addition of another task so that it looks like this. <br> $\sqrt{ }$ Prep for status meeting - 15 min <br> Prep for conference call - 30 min <br> Research missing invoice - due in one week - 30 min. <br> Complete project assignment - due in 7 days -50 hours <br> Research vendor issue - due in one week - 30 min <br> Put together expense report for entire project to date - due in two weeks - 3 hours <br> X Research project software bug -due in one week - 45 min <br> Project management responsibilities - ongoing <br> Fade out. |


| 1. | Mary: Ok. Is there anything else that needs to be addressed? <br> Kevin: Do you still think you'll be able to resolve the vendor issue by tomorrow? <br> Mary: Thanks for bringing that up. Yes. I should be able to get that to you by tomorrow, but I will not have a chance to look into the invoice issue by next week as I initially said. Some other higher priority things have come up since we met last. <br> Anne: You know. I can probably run that down in the next week or so if you don't mind handing it off. <br> Mary: That would be great! | Fade in to Mary addressing a conference room of people. This is her team meeting. There's no need to show all the people but give a sense that she's in a meeting. <br> Kevin shifts in his seat and speaks up. <br> Mary nods as she begins to speak. <br> Another female team member speaks up. Can just do a voice over if want. <br> Mary smiles. <br> Fade out. |
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| 1. | Rose: Hi there! How's it going today? <br> Mary: So much better. I mean there's still a lot going on, but I feel like I have a much better handle on things. Not so overwhelmed! <br> Rose: That's so great. I'm glad that the techniques I showed you are helping. <br> Mary: They are! Thanks again for taking the time to show me. <br> Rose: No problem! | Fade in to Mary returning to her desk. Rose pokes her head in just as Mary gets settled. <br> Mary looks excited. <br> Rose smiles as Mary talks. <br> Mary beams. <br> Fade out. |
| 1. | Voice over: As you've seen, effective management of tasks and priorities is not only a critical skill, but one that can be learned and improved with regular practice. <br> By employing techniques like those shown, you'll soon be able to take charge of your day, rather than having your day take charge of you. | Perhaps we can just have a collage of photos a pad with a list on it (doesn't have to be legible), a clock, the numbers $1,2,3$ and a person with a pad --fading in and out as the audio plays |

