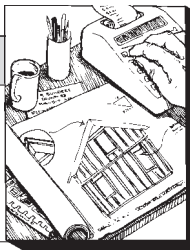


# A "To-Do" List That Works

by Rex Underwood



Monday, 7:30 a.m. It's bid day for the Shawn project, and you still have to complete the hardware take-off. You've also promised Ms. Tyler you'll get specification alterations to her by 10:00, and your biggest client is leaving for two weeks and you need to bill him before he goes. Then your lead carpenter on the Porter job calls in sick, and your lumberyard calls to say its driver can't get onto the Matthews site because you're not there yet to unlock the gate.

Sound familiar?

If so, you could probably improve both your effectiveness and state of mind by using a good time-management system. The phrase sounds ominously corporate, but all it means is learning to organize and use your time systematically. For contractors, this is crucial if we don't want to spend our time simply putting out fires—that is, if we want to run our businesses instead of having them run us. A good time-management system lets us clarify our goals, avoid disaster, and prioritize the many tasks that make up a contractor's work.

The system I use, which draws on the work of several time-management experts, centers around a daily action list and time log. It is these two pieces of paper, consulted constantly, that let me plan, use, and track my time effectively. I keep them on facing pages in a binder I always carry with me.

Also in the binder are several tabbed sections that aid in putting these two daily sheets together: a month-at-a-glance calendar to schedule future appointments and deadlines and avoid conflicts; an overflow list to keep track of the "to-do" items I can't get to right away; and finally, a separate section for each job, each with a master construction schedule and other crucial documents. The first page of each job section is a punch list organized by trade and updated weekly or daily as necessary.

## First Things First

The action list (see sample, next page) is the heart of the system. It lists my appointments and tells me at a glance what I need to get done that day. The key to making it work is prioritizing my tasks. To do this, I start by listing all the things I need to take care of in the next few days. To keep this list current or make a new one, I review my

overflow list, my day's mail and phone calls, my individual job schedules, and my appointment calendar. To make large projects manageable, I break them down into more manageable tasks and then list those individually.

This gives me a master list of things I need to do in the next, say, two or three days. There might be anywhere from a dozen to 30 or more. I assign an A, B, or C priority to each of these items. Then I divide the Bs into As and Cs, and put the Cs mentally aside until next time. Inevitably, some of the Cs resolve themselves or prove unnecessary; the others can be resorted into the As as they become urgent.

Finally I prioritize the A items. For each one, I assign values of 1 to 3 (3 being the highest) to each of three categories: one ranking the task's importance, one its short-term urgency (whether it needs to be done immediately), and one for the trend the problem will take if left undone (will it get better or worse with time?). I have special columns for this on the computer-generated form I use, but you can easily do the same thing with a legal pad.

A fourth column holds the totals of the other three columns. This gives me the relative importance of the tasks. For instance, a "9"—a score of 3 for importance, urgency, and trend—is a top priority that should be the first thing I tackle between appointments, even if it's the only thing I accomplish that day. When I have the items prioritized, I list the phone calls at the top of my action list and the tasks on the bottom. Appointments go in a special column along the left side. Pocket calendars such as the Daytimer books can accommodate a similar arrangement.

The final step is to estimate how much time each task will take, so that I don't overcommit myself. If I've bitten off too much, I try to move low-priority items back to the overflow list.

The overflow list is also where I jot down tasks as I think of them during the day. It's a crucial part of the system: I don't have to worry about forgetting a given task, because I know it's there on the overflow list and can be pulled onto the daily action list as needed. Meanwhile, it's not distracting me from what should be my primary tasks for the day.

PRIORITY: Mac Nail Job Cost		DATE: 5/10/91 MON TUE WED THU FRI SAT SUN												
TIME	APPOINTMENTS	HR	ACTION RECORD								I	U	T	=
6:00	pens, PRINT CARTRIDGE	0.5	CRAIG ROSEN, GET CHECK							3	3	3	9	
		0.2	GOOD DEEDS							3	3	3	9	
7:00		0.3	MAKE CALLS OF CONTACTS							3	2	2	7	
		0.2	SEYMOUR DUNCAN							1	2	3	6	
8:00	X CALL KEN LESSBURG	0.2	YOUNG 963-6787							3	2	1		
	969-1632	0.3	LATIMER 969-1844							1	1	1	3	
9:00	X BUSINESS CARDS													
10:00	X SB SPA													
	X HARDWOOD MILL													
11:00														
		0.3	INVOICE FOR DR. PONTO							3	3	3	9	
NOON	X \$ TO BANK	0.4	BUSINESS CARDS							3	3	3	9	
	X BRUCE GREEN	1.0	FINANCIAL PLAN							3	3	3	9	
1:00	X JERRY GOODMAN, ARCH.	1.5	MIDLAND COVER LETTER							3	2	2	7	
		0.3	RETURN T-111							1	2	3	6	
2:00	X LEE CONSTR	0.3	HOT TUB DRAIN							1	2	2	5	
	PDI ROOF, CH 11, PLUMB REFL	0.8	READ BRADSHAW							2	2	1	5	
3:00	ASBESTOS	3.0	DUNCAN BID							1	1	1	3	
	PETTY CASH													
4:00														
5:00														
6:00														
7:00	X FINANCIAL PLAN W/MARY													
8:00														
9:00	GUTTER AT ROBERTSONS													
	SCRIPT WORK	9.2	TOTALS INCL. APPOINTMENTS											
GOALS FOR THIS WEEK:-		1 PREPARE 1000 PIECE MAILING												
		2 MAKE FINANCIAL PLAN												
		3 ARRANGE DATE FOR NEXT SEMINAR												
		4												
		5												
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The author's daily "action list" includes both his scheduled appointments (left side) and prioritized to-do list (right side). For the to-do list, a column for estimating the time required (marked "hr") helps prevent overloading, while a three-column prioritizing system ("I" for importance, "U" for urgency, and "T" for trend) helps rank the to-do list. The author created this list himself, but similar forms can be purchased.

## Tracking Time

I started using a time log several years ago, when I found I was keeping as many as nine separate time cards for myself for each day of work—a system that let too much of my billable time slip through the cracks.

To replace it, I developed an easily maintained time log that lets me document the time on each project. The log is an 8 1/2 x 11-inch sheet of paper ruled with 48 lines, representing enough 15-minute increments to make up 12 hours. The time of day is entered along the left side of the page. Mine starts at 5:00 a.m. and ends at 5:00 p.m.; you could just as easily have it span from 7 to 7, or whatever suits you. A subtle vertical stripe of shading down the middle of each 15-minute column lets me track time in five-minute increments when necessary (as for phone calls). Since the page is made up of two columns, I can track any of the 24 hours if needed.

Rather than write a job name in every time slot as I go along, I assign each job a color from a set of highlighters, and simply mark the slot with the appropriate color. Other colors can stand for nonbillable "overhead" time, for sales or marketing efforts, or for personal time. At day's end my secretary totals the daily time spent on each job or administrative category.

This system works so well I began using a similar one (with fewer hours and 15-minute increments) for my work crews. They record not only the jobs they worked on, but which of the 25 different construction and job-costing categories (e.g., concrete, electrical, cabinetry, etc.) occupied them. This helps me job-cost labor costs quite precisely.

## Staying Out of Trouble

All this may seem compulsive. But it takes me only 10 or 15 minutes a day to keep the daily time log current, and another 10 or 15 minutes to organize the next day's action list. This half-hour not only ensures that I get the important things done, it helps me see how I'm spending my time. I can catch dangerous trends—too much time spent on unproductive work, for instance, or too much overtime—before they get out of control. Thus I once discovered that I had been regularly working 80 hours a week. I'd rather learn such things myself than hear about them from my wife's attorney. ■

Rex Underwood is a general contractor in Santa Barbara, Calif. He also works as a computer and construction management consultant and as a developer of construction-estimating and time-management software.