

Task **A**

Customer Service Supervisor Ellen Perry gets a legitimate request with a tight deadline. In the left-hand column, she posts Task A (on a sticky note, actual or virtual). Task A will remain “Requested” until she can estimate and timeline the task. She finds a slot for it on the right-hand “Committed” side of the chart where it stays until completed, most likely performed in segments as indicated on the timeline. Requester A may have access to Ellen’s chart, in order to track progress on the task.

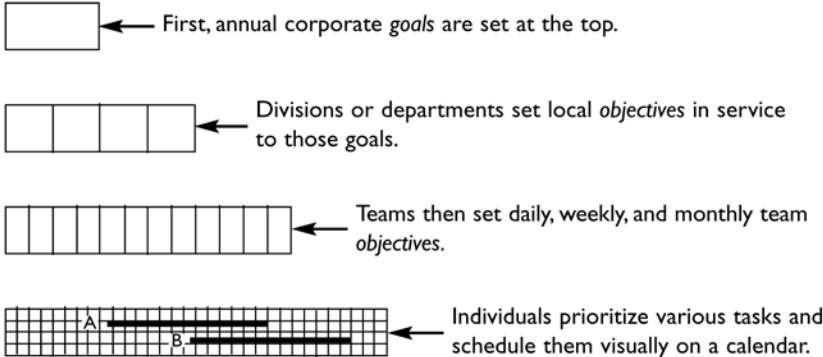
Task **B**

Another legitimate task, B, makes it to the “Committed” side, but it gets bumped, later by more important task C. Ellen does not shield Requester B from the realities. The task returns to the left-hand “merely requested” side for a while. (Incidentally, Ellen has learned by experience that a “bumped” requester will often mobilize, making small upgrades to the “waitlisted” task to render it ready for reinstatement ASAP.)

With practice using the Two-Column To-Do chart, Ellen builds a reputation for making promises she can actually keep!

WORKPLACE GOALS AND OBJECTIVES: OFTEN SET ABOVE YOU

Dictated by your organization's strategic plans, your workplace goals are set, primarily, at levels above you., then conveyed to you through your division or department head. Indeed, most major companies adhere to some form of Management by Objectives, illustrated thus:



A Large-Scale Industrial Illustration

Let's say a major steel company commits to building a new blast furnace and steel production facility. This huge project will take several years and massive resources to accomplish.

The *goals* statement may specify overall strategic details: acreage needed; environmental impacts; access to shipping, rail and road transport; production capacity: quantities and types of ores to be processed; types of steel to be produced—in short, a mountain of decisions that lay out strategic goals for the project.

Next, detailed *objectives* will be defined in each distinct category of early-stage development: shareholding, borrowing, budgeting, contracting, design, engineering, purchasing, architecture, production, testing—and later, recruitment, hiring, staffing, and day-to-day operating plans.

How a SMART Chart Exercise Begins

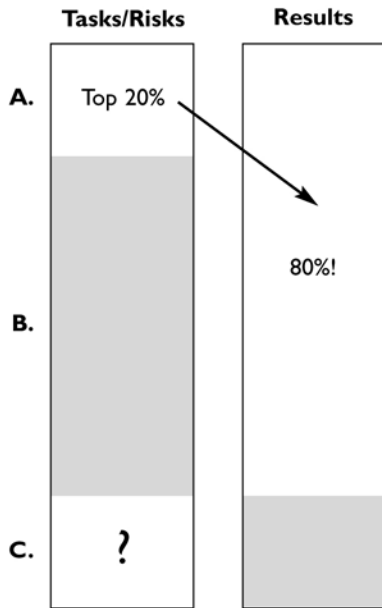
Imagine that you are a project manager tasked to move some of your staffers from one location to another. You take the opening vertical column of a SMART chart, and write one sticky note to define each vertical issue:

SMART CHART		Office Move			
	Project Manager	Facilities	IT	Moving Company	Engineers
Specifics (What?)					
Measurables (How much?)					
Attainables (Stoppers?)					
Resources (Who?)					
Timeline (When to when?)					

An Example

Use only one sticky note per letter: S-M-A-R-T.

S: Jot the specifics of the planned move. For example: “Move 15 computer drafting techs from HQ to Satellite Building on 10/22.” (Don’t labor over S details. You will refine them based on your work on M-A-R.)



A. Aeronautic and Quality Engineers specified the 20% of tasks that would produce 80% of results. They cited risks to be overcome for current and later flights. These got their prime focus.

B. Mid-level tasks (60%) taken together, would render the final 20% of results. These got secondary attention.

C. Lowest level (20%) were compressed, reevaluated, or removed as poor contributors.

Yes, this **was** rocket science.

What followed for these engineers were serious discussions about the criteria that a Task/Risk had to meet to merit their best slots, their best attention, their willing sacrifices.

CRITERIA: FOUNDATION FOR PRIORITIES

You may or may not be preparing a manned space flight today, but in either event you will need to choose the tasks that belong in your top 20 percent, and you need to eliminate the risks that might jeopardize your top 20 percent of results. That's why the rocket scientists equated *validating tasks* and *eliminating risks* as the prime process in prioritizing work to get results.

To set up priorities and hold them against all comers you need to base your choices on a set of criteria that others will recognize and respect. Here are some possibilities drawn from many different industrial and service settings:

Sample Risk/ValueCriteria	Project A		Project B		Project C	
	Yes	No	Yes	No	Yes	No
Safety threat						
Cost overrun						
Income potential						
Compliance						
Top-tier customer						
Critical path on larger effort						
Specialists needed						

Find Criteria That Fit Your Field

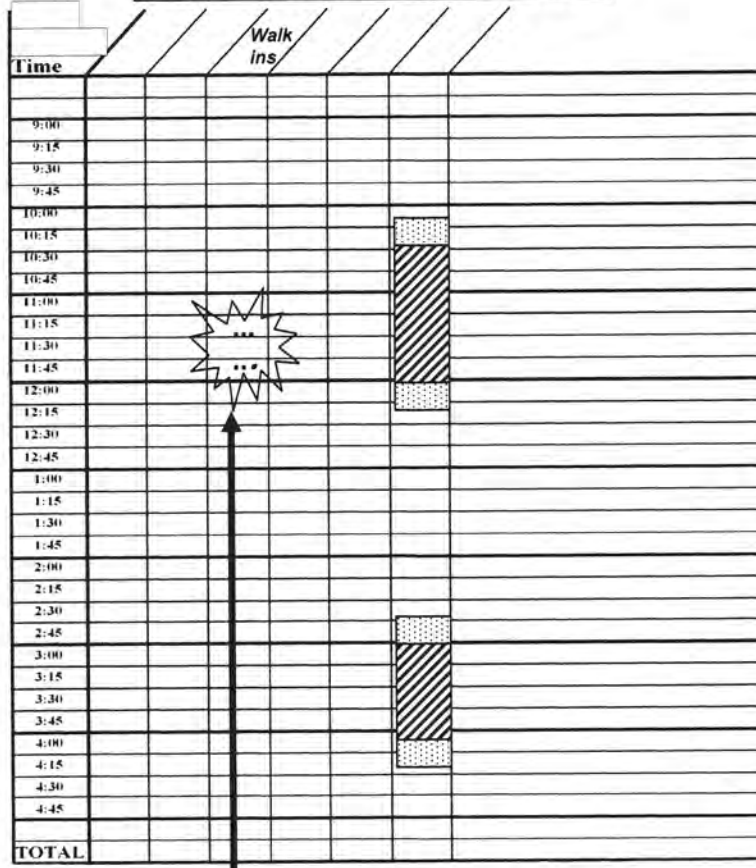
To reduce arguments when time is short, decide what specific features or conditions would justify “bumping” tasks previously validated in favor of a new priority. Invest time in setting these criteria. Arrange them in impact order: apply numerical weights if you like. Then, reap big savings in time and stress by eliminating “ad hoc haggling.”

UNIFY YOUR TEAM AROUND OBJECTIVES

When achievement of department objectives must rely on mixed specialties or disciplines, then the team’s day-to-day priorities may compete, inevitably, for limited resources—labor, budget, data, materials, and time. Your competing tasks and outcomes must be “readable” not just by you, but by your boss and other lateral groups, all parties to a challenge.

Top 3 Red Zone Tasks (Show times you allocated.)	Diversions from Red Zone Tasks (Note what you allowed to intrude.)
8:00 to 8:45 Get data for report due 2:00 PM.	8:15 Took call: office party. (5 min) 8:30 2nd call re party. (10 min)
9:30 to 10:00 Coach Alan on project	OK. Done.
12:30 to 1:30 Write report.	12:45 Spouse called re errand (10 min) 1:00 pm Checked email (15 min). 1:50 Yikes: I'm rushing to finish!

Protect Red Zones with Cushions



Red Zone Tasks
Block in only your most vital tasks (or segments) for today. No interruptions



Cushions
that say:
Come on in!



Unclaimed
Use blank spaces for 2nd-level tasks. Schedule at will.

Did you allow any interruptions (shown in dots) to steal time from Red Zone tasks?

Still Worried About Negotiating?

Once armed with objective standards, you, as the performer or SME, must use your data to highlight risks and negotiate priorities. Tough enough when dealing with in-house managers, the challenge really heats up when customers get involved. Lateral managers and their customers may hatch an attractive-looking plan that hides unacceptable risks for you or other performers.

Start the conversation with a graphic that helps insiders to focus objectively. Try a filled-in version of the Risk Criteria Chart proposed in Chapter 4. Use relevant, matched criteria to show threats to resources, or to compliance.

SAMPLE RISK/VALUE CRITERIA	Current Project A		Current Project B		Risks in Proposed Project C	
	Yes	No	Yes	No	Yes	No
Safety threat		x		x		x
Cost overrun		x		x	(x)	
High Income potential	x		x		x	
Compliance issue		x		x	(x)	
Top Tier Customer	x		x		x	
Critical path item on larger effort	x		x			x
Specialists needed					(x)	

Use Graphics to Settle Project Conflicts

When you must say no, be sure to focus the requester's glance on an objective map or document, rather than on your face. Here's a "diplomatic" risk-reduction tool we've introduced into many organizations to help managers

Q card	There's a Risk for You...	
Risk I see for you... (Requester!)	Options ... (Details on reverse)	
Decision (Show how new option reduces/eliminates risk.)		
Can you suggest a redesign that would serve you better?		

Some companies, having adopted this system, have added a column on the far right for comments designed to cut off further discussion by disgruntled meeting members who want to keep refuting the majority opinion.

Agenda/Minutes: Admiral Rickover-Style					
<i>Time</i>	<i>Item</i>	<i>Decision</i>	<i>Responsibility</i>	<i>Deadline</i>	<i>Comment</i>
10:00	A	Yes	BJ	9/15	
10:20	B	No	—	—	
10:35	C	Hold	DD	10/21	
10:45	D	Yes	CB	10/01	
11:00	Adjourn				

HOW TO DECLINE ATTENDING A MEETING

Why are you invited or summoned to a meeting? If your senior role, your authority, and/or your subject matter expertise are required, you may feel obliged to go, without question. But think again. Is this meeting in the top 20 percent of what you must do at that hour? Always ascertain the true purpose and status of a meeting before you agree to attend. You may be able to provide the requested data or authority without being there yourself. Ask the host what is required from you—and whether you can provide it in any other form—perhaps with written data, a supportive statement, an authorized stand-in, or an endorsement via video.