

Task Analysis Worksheets

OmniSkills, LLC Charlotte & Winston-Salem, NC www.omniskills.com



CREATING TIME: TASK ANALYSIS

Task Analysis: All-in-One Method [WS #1]

Step 1: Why do this task/activity/project? [WS #2]

Step 2: What needs to be done? (projects) [WS #3]

Step 3: Who will do this? [WS #4]

Steps 4 & 5: Where & When best to do this? [WS #5]

Step 6: *How* to Create Time [WS #6]

Step 6a: *How* – Time Focus [WS #7]

Step 6b: *How* – Time Sharing [W #8]

Step 6c: *How* – Time Compression [WS #9]

Step 6d: *How* – Time Acceleration [WS #10]

Step 6e: How - Time Shifting [WS #11]

Step 6f: *How* – Time Elimination [WS #12]

What to do right now? [WS #13]

Creating Time Log [WS #14]



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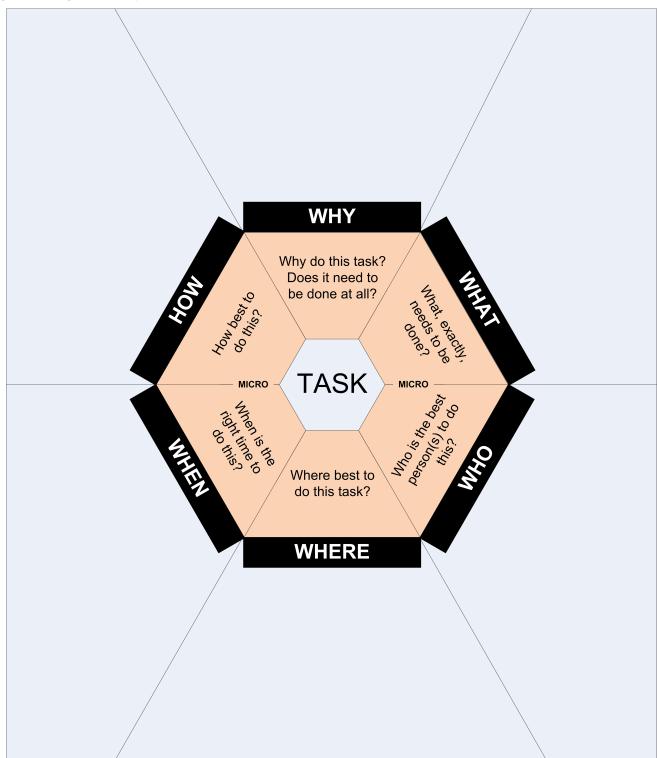
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Task Analysis: All-in-One Method

This page is a summary of the task analysis process. You can use this page to capture all of your thinking about a task or project. If you need to explore any of these facets in more detail, use the worksheets that follow.

Task/Activity or Project:



1: Why do this task/activity/project?



For this and all worksheets, answer only those questions that apply to the issue at hand.

| l'ask/Activity/Project: |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Why does this need to be done? What does it accomplish? |
| Does this really need to be done at all? |
| What happens if this doesn't get done? |
| |
| Can this be put off? |
| Should this be put off? |
| Is there something that should be done instead of this? |
| Does this fit in with my plan for myself? Is it in alignment with my values? Does it help me or the organization to reach defined goals? |
| If I need/want to do this, and I haven't, what's stopping me? |
| DECIDE: Based on your answers above, is this worth doing? If not, enter the time savings on your Creating Time Log. If yes, continue to the next step, "2a: What needs to be done? (projects)" or "2b: What needs to be done? (tasks)." |

2: What needs to be done?



Use the top of this worksheet for multi-step projects. For single actions, and for the individual steps in this project, use the lower half.

| Project: |
|--------------------------------------------------------------------------------------------------------------------------------------------|
| What is the desired/required outcome? What are the deliverables? |
| When is the entire project due? |
| If the project can be broken down into stages, list them here, along with due dates for each stage. |
| |
| How well does this project need to be done? (Use a 1-10 scale, or a qualitative description.) |
| Accounting for the quality level, how long (realistically) will it take, in hours? (For multi-stage projects, do this for each stage.) |
| |
| WRITE the project on your Projects List. Then, continue below. |
| Task/Activity: |
| What is the <i>next action</i> you have to take? |
| When is it due? |
| How long (realistically) will it take? |
| What type of task is it (cognitive, physical, mechanical)? |
| What resources (people, tools, files, permissions, etc.) will you need? If applicable, note where the resources are located. |
| WRITE the next action on your Next Action list <i>or</i> place it on your calendar. Then, continue to "3: <i>Who</i> will do this?" |

3: Who will do this?



On this worksheet, you can analyze individual tasks or entire projects. If you analyze a project and find that you are still the person who must do it, analyze the individual parts of the project and see if the Who changes for those parts.

Task/Activity or Project: Is there someone who must do it, or who is required to do it? If so, is that person me? If not, who are all the people who could do it? Who are all the people who cannot do it now, but could be prepared to do it? Can I delegate it? If so, to whom? Can I outsource it? What would it cost, and what would I gain by doing so? If I must be involved, is there someone who can help me with it? **DECIDE:** will you do it? If not, enter the time savings on your Creating Time Log, and remove it from your system (Project list, Next Action list, and Calendar). If you will do it, are there parts that someone else will do? If so, enter the savings on your

OmniSkills, LLC omniskills.com Worksheet #4

Creating Time Log. If there are any parts of this that you will do yourself, continue to "4: Where & When best to do this?"

4/5: Where & When best to do this?



| Task/Activity: |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Where |
| Which physical locations (office, home, home office, conference room, Panera Bread, public library, etc.) would be conducive to this task? How can I make a location more conducive? |
| Where, within the physical space, is most conducive to this task (desk, work table, sofa, etc.)? How can I make a space more conducive (e.g., furniture, lighting, music)? |
| DECIDE: Where will you do this? |
| When |
| Should I do it right now? |
| What is the best time of day to do this? (Consider cognitive and resource issues.) Is there an optimal time to do this? |
| When is not a good time? When is a really, really bad time? |
| What day should I do this? |
| What month, quarter, or time of year should I do this? |
| DECIDE: When will you do it? Then, continue to "6: <i>How</i> to Create Time." |

6: How to Create Time



| Task/Activity: |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The How aspect of Creating Time includes six strategies. Use this sheet to select which strategy or strategies might work for this task. Refer to the individual How sheets that follow for examples and more extensive planning. |
| Select Strategies |
| <i>Time focus</i> is keeping all your attention on one task, avoiding task-shifting and multi-tasking, and limiting interruptions. How might you use time focus when working on this task? [6a] |
| |
| Time sharing is sharing the time it takes to do a task, which means both sharing the task with someone else, and sharing the task with something else. How might you use time sharing when working on this task? [6b] |
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| <i>Time compression</i> is removing the wasted time within an activity, by eliminating it, or by filling it with something else. How might you use time compression when working on this task? [6c] |
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| Time acceleration is learning to do something faster (skill development), finding a tool that allows you to do something faster, and selecting the right tool for the job. How might you use time acceleration when working on this task? [6d] |
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| Time shifting is moving a task to a time that suits you, which is not necessarily when it actually occurs. How might you use time shifting when working on this task? [6e] |

Time elimination is when you stop doing something you are doing, decline to do something you have been asked to do, or delegate (or outsource) the task to someone else. How might you use time elimination when working on this task? [6f]

6a: How - Time Focus



Time Focus Strategies

Time focus is keeping all your attention on one task, avoiding task-shifting and multi-tasking, and limiting interruptions.

- 1. Make time to work on the task
 - Estimate honestly how long the task will take.
 - Place the work block(s) on your calendar in which you will devote time to the task.
 - In shared-calendar settings, schedule a meeting with yourself so that no one can schedule you for something else.
 - Take on the task or project only if you have somewhere to put it and the ability to focus on it.

2. Do one task at a time

Select how long you will work on a task, and set a timer. Do no other task until the timer rings.

3. Limit distractions & interruptions

- Get things out of your head and capture them. Unprocessed thoughts distract you from your current work.
- Keep an "out" pad at hand to capture stray thoughts. Jot them down, then return to the work at hand.
- Select a place where interruptions and distractions are minimized
- Select a time when you will not be interrupted (for example, the hour before the workday begins).
- Turn off your telephone (route calls to voice mail).
- Shut down your email software (or, at the very least, disable notifications).
- Turn off or block out whatever else distracts you: television, radio, ambient noise, Facebook, etc.
- Close your door. If you do not have a door, place a barrier or sign across the opening.
- Proactively stop interrupters: hang a sign, leave instructions with your admin or co-workers, set an out-of-office autoresponder, change your voice greeting, etc.

4. Match tasks to your reality

- Match tasks to the time available. Got five minutes? Do a five-minute task. Thirty minutes? Do a 30-minute task.
- Match tasks to mental and physical energy. Brain strong at 9 a.m.? Do the most cognitively-difficult tasks at that time. Brain dead from 3-5 p.m.? Do your least cognitively-difficult tasks then: file, process, answer low-intensity e-mail, listen to voice mail, etc.

5. Incubate (but don't procrastinate)

• Step away from a task for a few minutes, or hours, or days. This *incubation* time has many benefits, including recharging your battery, re-setting your motivation, and often giving you new insight into the situation. (But don't claim "incubation" when it is really "procrastination.")

| Discover Your Own "Time Focus" Tactics | | | | | | | | |
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6b: How – Time Sharing



Time Sharing Strategies

Time sharing is sharing the time it takes to do a task, which means both sharing the task with some*one* else, and sharing the task with some*thing* else.

- 1. Have someone help you do it
 - Find someone to help you with a task.
 - Find someone to help you with a part of a project, by taking some of the tasks from you.
 - On any project, round up assistants and partners.
 - On a committee that you are asked to lead, find a co-chair.
- 2. Take turns doing it
 - For repetitive one-person tasks, find someone who can take turns with you (e.g., attending a regularly-scheduled meeting, preparing a certain report).
 - Delegate or outsource the work sometimes, if you can't do that all the time (e.g., doing research, cleaning the house, chaperoning a kids event).
- 3. "Multi-task" different types of tasks (cognitive and physical, cognitive and mechanical)
 - Combine your commute time (if you are a passenger) with your Readings folder.
 - Participate in a conference call while doing your filing or processing your in-basket.
 - Return phone calls while walking to lunch or to a meeting in another building.
 - Listen to a recorded podcast, conference call, or presentation while on the treadmill.
- 4. Share the "down-time" in task that requires intermittent attention
 - While doing something that allows intermittent attention (e.g., watching sports on television, or watching television live with commercials), do a low-cognitive tasks during the slow time (e.g., checking e-mail, opening your mail, reading from your Readings folder, etc.). Caveat: don't expect to be as efficient with any of these tasks as you would if the television were off.

| Discover Your Own "Time Sharing" Tactics | | | | | | | |
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6c: How – Time Compression



Time Compression Strategies

Time compression is removing the wasted time within an activity, by eliminating it, or by filling it with something else.

1. Reduce the space in between

- Find ways to make the wait take less time.
- Call ahead for reservations (for dinner, rides at Disney World, haircuts, etc.).
- Place orders in advance (e.g., order lunch ahead so it will be ready when you arrive; order tickets so that they can be mailed to you and not cause you to wait in the Will Call line).
- Go when the lines are likely to be short (e.g., avoid banks on Fridays, DMVs on the first of the month).
- Schedule appointments (e.g., with doctors, or anyone with punctuality issues) first of the morning, so they won't be running behind.
- Move closer to where you work; work closer to where you live.
- Select stores and services (e.g., bank, dry cleaner, office supply store, copy center, hair stylist, lunch place, etc.), by the proximity to your home or office or other regular stops, even if it means sometimes trading time for dollars.
- Leave home (or leave work) when traffic is lighter and the commute time is shorter.
- Minimize the time between events so that you are not left with space that is too small to fill productively.
- If scheduling a meeting with someone who is not in your office, have them travel to you, instead of you to them.

2. Remove the space in between

- Work from home on some days, and remove the commute time on that day both ways.
- Use a Digital Video Recorder (DVR, like TiVo) to watch an hour-long television show in 44 minutes by fast-forwarding through the commercials. A four hour football game: 90 minutes or less.
- Rent DVDs rather than watch television shows when they are broadcast, or movies in the theater.

3. Replace the space in between

- Always have something else to do for when you are made to wait.
- Bring your Readings folder, smart phone, or other task with you whenever you think you will have to wait in line, or in a waiting room, or in a conference room waiting for a meeting to start.
- Use your smart phone (Blackberry, Palm, iPhone, etc.) to check your email while waiting. Caution: returning email with your smart phone's tiny keypad might actually cost you time, rather than create it.
- For that waiting space that happens in your own office (conference calls that do not require continuous attention, waiting for someone to arrive for a meeting, etc.), do that semi-mindless paperwork, filing, or processing that has to be done.

4. Treat time as fixed, not fluid

- Schedule meetings back to back so that one cannot run long.
- Start on time, and be on time (for work, appointments, meetings, etc.). This respects others' time, and also teaches them to respect yours.
- End on time, and leave on time. This also shows respect for others' time, and teaches others to respect yours.
- Limit the length of a meeting or appointment. If everyone present knows a meeting cannot go over because of other obligations, then it generally will not.
- Limit the length of your workday. If your workday has no definitive end, you no strong reason to make the work fit your day. But when you have to leave, the work tends to get done.
- When someone is late, don't say, "That's OK," and give them permission to do it again.

Discover Your Own "Time Compression" Tactics

6d: How - Time Acceleration



Time Acceleration Strategies

Time acceleration is learning to do something faster (skill development), finding a tool that allows you to do something faster, and selecting the right tool for the job.

- 1. Skill development: learning to do something faster (an investment now that creates time over and over again)
 - For any task: look for ways to do it faster. Is there a better way to cut your lawn? A better route to drive to work? A better method to get to work? A better way to use your software? A better way to prepare a presentation?
 - Invest the time to learn the features in your software that will save you time. For example, in Microsoft Word: use styles to format faster; create AutoCorrect entries to enter commonly-used text in a couple of keystrokes; use tables for quickly organizing data. In any application: create templates for documents you use more than once; begin with an existing document, then Save As. On the web, learn how to write a Boolean search query to find what you want quickly.
 - Filing: learn to organize your paper and electronic files so that you can get to them easily.
 - Find the "rapid" way: learn rapid presentation planning, learn speed reading, etc.
- 2. Tool discovery: finding a new tool (technological or physical) or method (the way in which we do something)
 - Adopt Creating Time, Getting Things Done, or another system to help you manage your tasks.
 - Find new software, instead of using what comes with your computer (e.g., to get your video or photographs from the camera onto the computer, edit, and distribute them).
 - Learn the Creative Problem Solving process for deliberate problem solving (www.omniskills.com/cps).
 - Create checklists for common but detailed tasks, such as giving a presentation, or packing for a business trip.
 - Use "rules" in your email software to separate automated mailings (newsletters, vendor advertisements, etc.) from messages sent by real people.
 - Email: to write a succinct email message in a short amount of time: stick to the main point, avoid back story and details, use bullet points, which help you to focus (and your reader, too).
 - Keep email messages brief. Unless it is absolutely necessary, keep the back story and minor details out. The reader(s) can always contact you if they need more than you have told them.
- 3. Tool selection: choosing the right tool for the job
 - When communicating with another, choose the right tool: email, telephone, voice mail, in person.
 - Choose the right software for the job. For example, use Access as a database, instead of Excel; Lay out pages in Publisher or other dedicated desktop publishing application, instead of using Word or PowerPoint; outline a presentation using Word's superior outlining tools, rather than PowerPoint's awkward ones; use Microsoft Project to manage extended projects, rather than using a notepad.
 - Return email with your desk computer's full-sized keyboard instead of your Blackberry's tiny one.
 - Take the direct flight instead of the slightly cheaper one with a stopover.
 - Take the train rather than drive across the state, so that you can get some work done along the way.
 - Go in-person, or use a video conference, teleconference, web conference, or telepresence system instead?
 - Use a travel agent, or purchase tickets online?
 - Go to a store, or call ahead? Shop in-person, or on the web?
 - Pre-shop on the web to review products, then buy in person in some instances. In other instances, do the reverse.
 - Use a focused search engine for some queries, rather than always using Google (e.g., wolframalpha.com)
 - Ask the question instead of relying on habit. For example: rake or leaf blower? Hand wash or dishwasher? Hand wash or car wash? Stairs or elevator? Paper and pencil or PC?

| Discover Your Own "Time Acceleration" Tacti | Di | |
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6e: How – Time Shifting



Time Shifting Strategies

Time shifting is moving a task to a time that suits you, which is not necessarily when it actually occurs.

- 1. Move something from its normal time to your own time
 - If a conference call does not require your direct participation, listen to it recorded, at a time that suits you.
 - Download, stream, record or rent newscasts, shows, ballgames, movies, etc., then listen or watch when you want and possibly while doing other things such as working out or commuting.
 - For television, use a Digital Video Recorder (DVR, such as TiVo) to record programs and watch them when you want, not when they are first broadcast. (Bonus: this also allows you to skip commercials and any part that is not worth watching.)
 - For movies, use a service like Netflix so that you don't have to leave your house to rent or return. (Red Box is \$1 per night, but you have to go and get it, and you have to bring it back. What's the hidden cost in that?)
- 2. Do something at a time that is not normally expected
 - Return calls after hours and leave voice messages, which are quicker.
 - When a meeting is scheduled, offer an alternative time if the original time does not suit you.
 - Arrange multiple things, such as errands or meeting agendas, in the order that makes linear or connective sense.
- 3. Do something at its ideal time
 - Work during lunch hour, when the office is quiet and the eateries are crowded. Go to lunch when the office is crowded and the eateries are empty.
 - Drive into work, or back home, just before or after the commute time.
 - Avoid doctors on Mondays.
 - Make appointments with any service that has back-to-back appointments first thing in the morning.

| Discover Your Own "Time Shifting" Tactics | | | | | | | |
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6f: How – Time Elimination



Time Elimination Strategies

Time elimination is when you stop doing something you are doing, decline to do something you have been asked to do, or delegate (or outsource) the task to someone else.

1. Say "no" to something new

- If you don't want to do it, don't do it.
- Without excuses, say no gracefully.
- At work, when given a new project, negotiate where it fits with your existing work. For example: "These are my current projects, and my plan for when each will be completed. Which of these should I not do, or move the delivery date on, or lower the priority on, in order to take on this new project?" (Note: works best after implementing Creating Time.)
- In your personal life, say no to starting new time-intensive activities (such as golf, or training for a marathon) and time holes, such as Facebook. Say no to parties you do not want to attend.

2. Stop doing something you are already doing, completely

- Quitting is difficult, but not impossible. If you want to, or need to, stop something, then stop.
- Ask: what do you gain, versus what you surrender, to continue doing this?
- If quitting leaves a void for someone else (e.g., when you are on a committee), find your own replacement.
- Analyze the things you do habitually, and exorcise the ones that no longer suit you.

3. Stop doing something, some of the time

- Attend only the part of a meeting that actually requires your presence.
- Stop tracking people down to get answers: when defining the question, provide a default answer: "if I don't hear from you by 5:00 on 10/15, I will go ahead with Plan A." Hate filing (like we all do)? File only what must be filed and recycle, shred, and toss the rest.
- Breaking up is hard to do; maybe the two of you just need some space. (This is not just for relationships.)
- Work at home one day a week and save the commute time, both ways.

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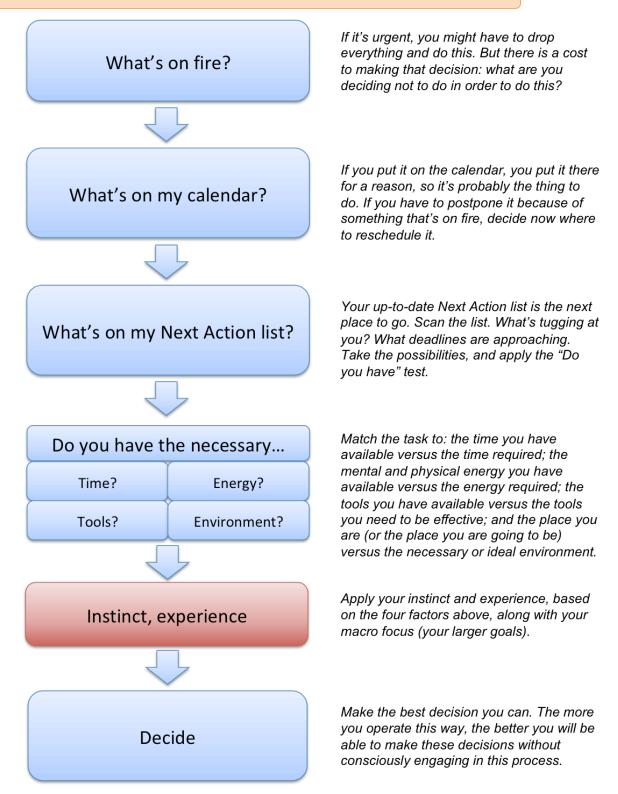
- Eat lunch at your desk in 20 minutes rather than going out for an hour (which saves money, too, if you bring your lunch from home).
- Outsource some of your home improvements and repairs. You don't need to do everything yourself, even if you can.

4. Eliminate something and substitute something else

- Consider, for things that you need, that there might be a better replacement for something.
- Where do you get your news? Would radio be better than television? Newspaper better than web?
- What do you do to work out? Does it always have to be an hour-long bike ride? Could you run, or swim, or do Pilates instead? Could you bike to work instead of driving? Carpool instead of driving? Bring lunch from home instead of eating out?
- Don't duplicate effort. For example, use only the company-required electronic calendar system, instead of maintaining a separate paper one.

Omni Stils IMAGINE YOURSELF TOMORROW

What to do right now?



Creating Time Log



Use this log to document how much time you have created, and how you did it. This will provide you with a way to confirm your progress, and to provide a record of what worked when you have similar situations in the future.

| Task/Activity/Project | Time Cost (hours) | Per (circle one) | CT Method | Hours Saved/Year |
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