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Get Organized, Release the Overwhelm, & Get Profitable

Process Overview

This system is a quick, easy and fun way to manage your workload and prioritize your time. At the end of the day it gets to work for you so consider these guidelines not rules. Play with it over time and see what works best for you and your business.

Create Your Space

This process can be done with sticky notes/note cards on a blank wall, poster board, or cork board OR it can be done electronically on a site like Trello or Asana. (If you're curious about the origins or want some examples google Kanban boards.)

Each has its pros and cons. I like the physical process of moving sticky notes around and being able to see it easily in my office. But if you have remote team members, work from different places, or don't have the wall space the electronic version is much more useful.

Whatever you decide, start by creating columns for Brain Dump, Prioritized, In Progress, Blocked, Done.

Step 1: Brain Dump

Write down all of the tasks, ideas, to-do's, etc. Get it out of your head and onto a card. A simple one liner is sufficient as long as you know what you're talking about.

Step 2: Scoring

Scoring is done on a scale of 1-10 in 3 categories:

- Difficulty/time to complete
  - 10 = Easy
  - 1 = Hard
- Profitability/ROI
  - 10 = Profitable
  - 1 = Not a money maker
- Enjoyment in the doing
  - 10 = It lights me up to do this
  - 1 = I'm really dreading it

Don't overthink your scoring. It's simply what it feels like to you. It's your business after all. And it's better to start somewhere and refine it then to get stuck trying to get it perfect.

Step 3: Prioritize

Move the cards with the highest score to the top of the Prioritized column, working your way down the column to the lowest score.

Step 4: Break It Down

That simple one liner you wrote may actually be a lot of work! Think about all of what goes into getting it done. Is it possible to break it down into smaller tasks? If so, do it. Create sub tasks for that main item so that each smaller chunk can be worked on separately (and possibly by different people or at different times).

Step 5: Do the Work

As you (or a teammate) are ready to work on something move it from the top of the Prioritized column and into the In Progress column. Work on it until it's done. If something prevents you from finishing it (other than time) move it into the Blocked column and choose the top item from the Prioritized column. When the block is removed move it back into the In Progress column to be finished. The Done column seems self explanatory, when an item is done move it from Prioritized to Done :)

It's that easy!

A few suggestions...

Any time you have a new creative idea, think of something that needs to be done, want to get distracted by a cool new project write it down and put it in the brain dump. Once per week score those items in the brain dump and reprioritize your bucket of work.

DO NOT reprioritize those items you have already started to work on unless something major has changed that affects its prioritization. You lose momentum and knowledge if you move half done items down for later.

Play with what works for you. If you have certain tasks you do every day you may decide to omit them from this process. Maybe you just need help with organizing and prioritizing creative ideas and that's all you want on your board. As you use this process you will learn what supports you the most and tweak it to fit you and your business.

A word about delegation...

Anything you can delegate - do it! A quick and simple way to decide what to delegate first - decide which tasks you can't do and those which you don't enjoy doing. Anything that falls in both categories goes first!

If you have multiple people working from your board make sure that each item gets assigned to a person so you know who is working on what.

You can happily stop here but if you have multiple types of tasks you need to do each day and you're struggling with managing it all here is an additional option...

Incorporate time blocks. Set up a schedule of blocks for yourself. Your blocks may include things like Admin, Outreach, Sales, Projects, Research, Content Creation, etc. A time block should be 1-4 hours of time set aside for a certain type of activity. Set up your weekly schedule composed of a bunch of different time blocks that work for you.

For example:

Monday:

8-10 AM	Outreach
10-12 AM	Admin
12-1 AM	Lunch
1-5 AM	Projects

Tuesday:

8-10 AM	Sales
10-11 AM	Admin
11-1 PM	Lunch
1-4 PM	Projects

For each item in the Brain Dump add a category that matches your time blocks - i.e. Projects, Admin, Sales. You can do this by writing it on the card, using different colored sticky notes, or adding a label in Trello.

In each block choose the highest priority tasks to work on. Which means you will likely have more than one task in the In Progress column.

*Note - when creating your time blocks think about what times of day you do best with different sorts of tasks and set them up to support you. Like getting sales activities done first? Set that time block up in the morning. Feel most creative and inspired in the afternoon? Schedule your Projects blocks for that time.

If you have any questions or feedback feel free to contact me at erica@ericajlester.com!