How to Get Things Done

eWay-Book

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Contents

1 Introduction 3
2 Why We Need Time Management 3
3 Is it really time for a change? 3
4 GTD – In General 5
4.1 Step 1 – Recording Requests 5
4.2 Step 2 – Processing Requests 5
4.3 Step 3 – Planning Requests 5
4.4 Step 4 – Task Review 6
5 GTD – eWay-CRM Practice 8
5.1 Preparation – Inbox in Outlook 8
5.2 Preparation – Create categories (contexts) 13
5.3 How to Create a New Task – Manually (Steps 2 and 3 – Recording and Planning) 14
5.4 How to Convert an E-mail to a Task (Steps 2 and 3 – Recording and Planning) 17
5.5 How to QUICKLY Convert E-mail to Task (Step 2 - Recording) 18
5.6 How to (Bulk) Change Category (Context) or Due Dates (Step 3 - Planning) 19
5.7 Task Summary in eWay-CRM for Outlook (Step 4 - Review) 20
5.8 Putting it All Together 22
6 Simple and Practical Tips How to Master Your Tasks 23
6.1 The Time Management Matrix by Stephen Covey 23
6.2 A Task is a Goal and the Goal is SMART 24
6.3 Is Priority Setting Good? 24
6.4 A Big Stone vs. a Small Stone 24
6.5 Start with the Most Difficult 25
6.6 Cut the Elephant into Pieces 25
6.7 Careful About Multitasking 25
6.8 Become a Practical Realist! 25
7 Start Now! 26
8 Books That Inspired Us 26

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1 Introduction

Dedicated to David Bell and all others who want to be truly effective.

This GTD eWay-Book is focused on time management – a way to manage your time. Time management is what distinguishes productive from unproductive people, effective from ineffective, successful from unsuccessful. Time management is one of the key abilities and if we manage it, everything becomes easier and faster. Our time management is based upon the GTD method by David Allen and the Time Management Matrix by Stephen Covey. Naturally, eWay-CRM is set up to take advantage of these methods.

2 Why We Need Time Management

The day comes to an end and you are trying to revise all the things you have completed today. But it's not possible. You attended a couple of meetings and made several phone calls. You wanted to start a big task, but your colleagues kept distracting you from your work. You did all and nothing at the same time and now you are feeling frustrated. You would like to cross something out, tick something off, grab a post-it note from the edge of your monitor and tear it up, but you can't. It hasn't been done yet. But how come?

You even got up and came to work early. You have started so many things, but you haven't managed to finish a single one. No wonder, when people kept distracting you. A loud colleague in your open space, an annoying client, a friend on Facebook. It was simply impossible to concentrate. And all those unnecessary meetings! Meetings should be cancelled. When the telephones finally stopped ringing and you made yourself a cup of tea so that you could really start working, you checked your watch and freaked out. I have to pick up my kids at school! So that's all for today. You feel tired, but it´s not a good tired. Maybe tomorrow will be better.

Maybe it's time for a change.

3 Is it really time for a change?

The question mark in the title has its purpose. Some people like it like that. Some people need it and are proud of it. Some people need to be surrounded by chaos, piles of papers, late tasks and people who don't know what to do, keep distracting them and asking questions. Those people don't need a change. Quite the contrary – they don't want it!

The others are going to get on a journey. A long journey full of changes, because the changes are necessary. We will get rid of old habits and create new ones, we will search and optimize the system, we will learn how to say "no". We will look for he courage to reach goals, move in positive direction and get things done.

They say that in order to fully adopt a new skill, you have to repeat it every day for 21 days. That works for exercising, language learning, time management as well. Day by day, no rests. If we forget it one day, we get back to the beginning and we have to start almost from scratch.

But there is nothing to be afraid of, it's manageable. I am myself one of the many living examples.

At the very beginning of my career, I was still a student. I went to university daily while starting a business with my colleagues. I also had a personal life and other interests, of course. I used to get up early in the morning and collapse on my bed late in the evening. I kept going from school to work and vice versa, at the breaks I took care of phone calls and e-mails and at lunch breaks, I wrote offers for those interested in our product.

While I created a primitive system for time management and task administration, however, I often got lost in all my notes and before I could the piece of information I needed, the break was over and I had to go back to the classroom. So, I kept reading,

studying and looking for a way out. I wanted to find a system that would make my work more effective and easier. A system that would help me manage everything while still keeping my space.

So, I defined my basic requests, simply for myself:

1. To have all my tasks on one place.
   I often put my tasks down on pieces of paper, I also used Outlook and notes on my phone. It took a lot of time to go through everything. And from time to time, some of them got "lost."

   It's ideal to have "everything in one place." And to be able to rely on that "place." Thanks to that, we can always be sure where to find things we need to get done.

2. To make the tasks immediately available for action.
   For both reading and writing. For example, when you are on a subway, you can't start scrolling through an notebook, try to hold yourself and try to look for something to do on your 15 minutes journey. And you definitely can't use a pencil to make notes about something you have just thought of.

   That's why our system must display the tasks as fast as possible as well as have an ability to write down a task for us. That must be possible even using one hand on a subway or while you're watching TV in the evening.

3. To have a solid structure in tasks.
   A long list of tasks or scrolling through a notebook doesn't help. Before you look through it, resp. skim all the pages, your free 15 minutes has gone. And that amount of time can already have been used for something.

   A clear structure is something we are definitely going to need. Because if we want to be truly effective, we need to have everything perfectly structured.

4. Flexibility.
   Have you tried scheduling tasks into your calendar? For example, that you will make an offer to a client Friday after work. And you will do it from 12:30 to 1:30. However, on Monday when you were planning your task, you didn't know that Friday's lunch will be so long. And that´s why at 12:30 you won't be able to make an offer. You will be barely getting by. Or something urgent will come up and your whole schedule will be destroyed.

   Being flexible is much better. Being ready to react to urgent and unexpected things, being ready for the fact that things can turn out different than planned. Making an offer for a client might be too challenging with a limited amount of time, however, you can finish a few routine tasks with no problem. Or take care of a couple phone calls. That is why flexibility is so important.

5. Applicable to Teams. Nothing is worse than going through the diary of a sick colleague (and trying to read his handwriting) or through his e-mails to try to find out what exactly he had promised to the client.

   Much more effective is having things organized in the same or at least similar way. Then you can even share tasks with each other. Haven't you ever been in a situation when you have finished all your tasks and you are willing to help a colleague? ☺

So, my basic requirements were defined in my head, what I was still looking for was a way to solve them all.

And that is when I came across the book "Getting Things Done" by David Allen (Allen, 2015). I started applying the method described gradually and after a few months, I can say I was 30% more effective, because I managed 30% more things in the same amount of time. No kidding.

How to Get Things Done.

4 GTD – In General

The aim of this eWay-Book is not to rewrite David Allen's GTD methodology. What we are trying to do is to describe how I incorporated the methodology into my life and eventually my whole company. If you are interested in the complete GTD methodology, we recommend you reading Allen's book (Allen, 2015).

We used the basic ideas and the fact that GTD is flexible. That differentiates it from other methods, which requires scheduling a specific times for each task in your day.

The method is based on a few simple steps. These steps are related to the life cycle of individual requests and in each phase, there are clear recommendations how to proceed.

You will see that it is actually quite simple. Let's go through the steps together:

4.1 Step 1 – Recording Requests

We are overwhelmed by requests. E-mails, phone calls, colleagues who need to talk to us, etc. Everybody wants something and they want it now. It's just a minute! And this is what we need to deal with. These requests need to be recorded to a so-called Inbox.

This is a hypothetic folder where everything goes. A part of the inbox is made by the Inbox in your Outlook. That is a good example of how it works. Your Inbox in Outlook receives e-mails from colleagues, clients, suppliers or partners. Think of every email as a request made by someone. These e-mails need to be processed!

4.2 Step 2 – Processing Requests

The next step is processing requests, where each request goes through a simple decision diagram. With each request, we can do one of the following:

1. The request can be deleted, ignored or denied.
   We receive spam, our colleague asks for something we cannot do, etc.

2. We delegate the request to somebody else.
   By delegating, we do not mean delegating in a senior – junior relationship. We mean forwarding the message to a competent colleague. For example, a Sales Rep receives a technical request and asks a colleague from the Service Department to help. Or we receive an accepted invoice for further processing, but first we need the Director's consent. So, we delegate it to him.

3. We satisfy the request straight away.
   If the request can be executed within 2 minutes, do it immediately. For example, answering an e-mail.

4. We plan, how to satisfy the request.
   If the request asks for more than 2 minutes, plan to complete it in other time. Don't do it now.

Let's use the example of e-mails again. Look into your Inbox in Outlook, where we see a new message. We can delete it, forward it, reply immediately or plan it for later, because we will need more time for it. Same applies to an incoming phone call or a colleague's question.

4.3 Step 3 – Planning Requests

If we chose to satisfy the request later, we must create a plan. By setting a Date for completion, Context (category) and Project.

In order to later be able to find the request we need a system that we can rely on. eWay-CRM comes in handy at this point, you can download it for free here.

GTD offers us a hand and the best part is that we can adjust the details of the system that are the most suitable for us and our work.

1. Date.
   When you want to complete the task.

   Don't forget that one day has only 24 hours and you cannot complete everything today. Be a realist!

2. Context.
   Imagine a place, a tool or a person necessary for completing the task. An example of a context is the "Office"for tasks you have to finish at the office, probably because of technical means. Another example can be "Phone" for tasks that only require a phone. One of my friends, who was using GTD for personal purposes as well, had a context labeled "IKEA". There he listed tasks which he wished to complete while at IKEA.

   As an inspiration, let's see some of the contexts recommended by Allen (Allen, 2015):
   a. Has to be today – For tasks that we have to finish today.

   b. Phone – For tasks that require only our cell phone (with eWay-CRM Mobile) and can be completed for example while driving home on hands free.

   c. E-mail – For tasks that only require e-mail access. These can be completed on a subway or in a parked car.

   d. Office – For tasks that require a PC, a roof, or the attention of

   e. To read / think – For tasks that mainly require peace and quiet.

   f. Check – For tasks that we have delegated and we want to make sure they are finished. Or for those where the client has promised to send us something.

3. Project.
   When we give ourselves a task, we have a purpose. We want to accomplish something.

   Tasks are a part of something bigger, a project. It's not important whether it is an order, an internal project or a part of client care.

Imagine being in a parked car and having 30 minutes until your next meeting. You only have your cell phone. With a system of labeled tasks, you won't waste time figuring what to do. You will choose tasks with the context "Phone" or "E-mail" that are to be finished today.

4.4 Step 4 – Task Review

Tasks are not only about recording and completing. From time to time, we need to stop for a few minutes, look back and try to realize whether we are going the right way. And that is what reviews are for.

Although GTD doesn't command any absolute reviews, I have decided to prepare a few recommendations based upon my own experience. To be clear, your GTD system will not work without these reviews.

4.4.1 Task Review – Once a Year

These are called New Year's resolutions. We make them at work as well and we usually think about them at end of the year. These are big goals we would like to achieve by the end of the year.

"Increase turnover by 20%."
"Complete the project for client XY."
"Activate a new website."
…

These tasks can also be called "Projects", but it's basically the same. To achieve something (ideally quantitatively measurable) and to achieve it within the deadline. These tasks break down to smaller tasks.

4.4.2 Task Review – Once a Month

These reviews are extremely important. They help us realize whether we are still making progress on the big goals we have set during our annual review.

However, they can be changed in case the plan has changed. The monthly reviews help us remain flexible and we don't need to wait until the end of the year to find out whether we have accomplished all we wanted.

4.4.3 Task Review – Once a Week

A tactic-operative review – a weekly plan. What do I want to achieve this week so that I keep working on those big things. We are all overwhelmed by operative tasks and unless we set a few strategic tasks each day, by the end of the year we can find ourselves at the same spot as a year ago.

I believe it is the best to do these reviews on Monday morning or on Sunday evening. However, it really depends on the type of your job and how you work.

It is important to do these reviews regularly. They usually only take half an hour and it's good to be in a peaceful environment.

4.4.4 Task Review – Once a Day

Did we finish our tasks yesterday? Can we finish yesterday's tasks today, or will we plan them for later? What can we possibly complete today? A small five-minute review while drinking your first cup of coffee can help. A week flies by too quickly for us to only do reviews every Monday.

At the beginning of the day, always review your yesterday tasks, if you haven't completed them. Don't leave them incomplete, that means "red" in both Outlook and eWay-CRM. "Red" is a psychological trick that makes sure these tasks get an attention.

I like to use the example of my colleague who had all tasks in Outlook marked red. Only one task was planned for the next day, therefore it had the color black. That one black task was bright as a star. Which task do you think my colleague completed first? Yes, the one that was supposed to be finished tomorrow. Those that were already overdue seemed to be invisible to him at first.

4.4.5 Inbox Review – Every Half an Hour / Every Hour

This is not about reviewing the planned tasks but reviewing the Inbox. That is the place where you mark incoming requests. Let me give you another example.

If you are writing a report for your senior colleague and you let incoming messages and phone calls distract you (unless your job requires that you answer immediately), you can easily find yourself writing the whole day. I recommend to everyone to switch off all those small notifications Microsoft Outlook shows when we get an e-mail. The thing is we can see the sender's name, the subject and a few words from the text of the e-mail. And if you see an e-mail from an angry client pop up, one that uses a lot of explicit language, you will need a lot of strength not to open it. The answer can wait a couple of minutes. When you have finished what you are just working on, you can go check your Inbox and process all your mail in the correct way.

This applies twice as much to cell phones. Try not only to switch off the sound, but also to put your cell away, or at least display-down. You will see yourself giving a better performance.

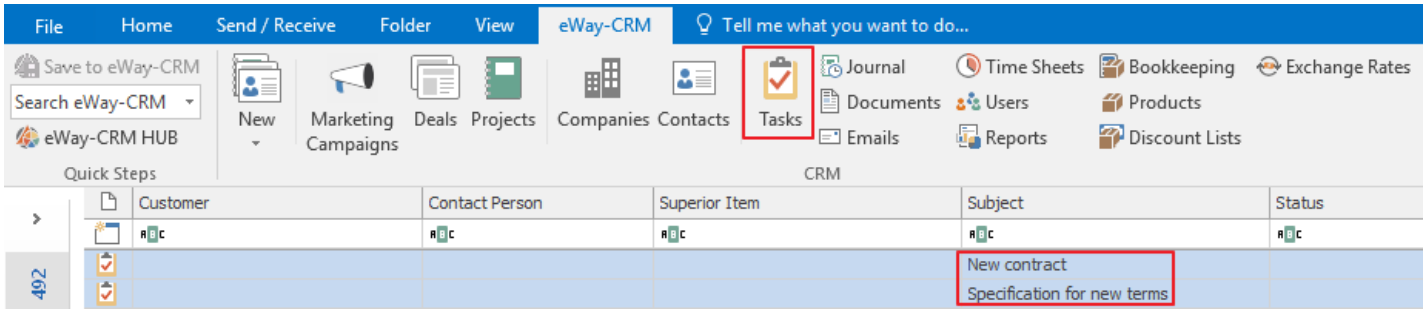
5 GTD – eWay-CRM Practice

In the previous chapter, we suggested the basis of the method. Now let´s take a look at implementing in eWay-CRM.

If you do not have eWay-CRM, install the free trial here. eWay-CRM connects with your Outlook, so you can keep working in an environment you already know.

eWay-CRM contains a Task module that is used for work planning. While we keep using our calendar for scheduling meetings, we use Tasks for recording and tracking what need to be done.

Tasks can be easily accessed from the main toolbar in eWay-CRM.



A card of each of the important modules has a Task bookmark. If you open a project, for example, you will only see the related task list.

Tasks can be grouped by clients, projects, solvers, dates or any other parameters. The task list is very flexible and everyone can adjust it to their own needs. There is also the possibility of conditional formatting, so the tasks of a particular category can highlighted by a clor you choose. For more information about working with lists please see this article.

A task can be created with a few clicks or directly from an e-mail. When somebody messages you, you can easily convert the e-mail to task.

And the best part is that everything is available on both tablet and cell phone for both iOS and Android.

Let's bring it all together.

I think that you can now imagine how well GTD can work with eWay-CRM to help you get things done. If you are interested in GTD further, message us on info@eway-crm.com, we will be happy to invite you to the next seminar. If you wish to attend a seminar regarding a different topic, message us also on info@eway-crm.com.

For those who have only just started with eWay-CRM, we recommend you contact our Sales Representative on info@eway-crm.com.

5.1 Preparation – Inbox in Outlook

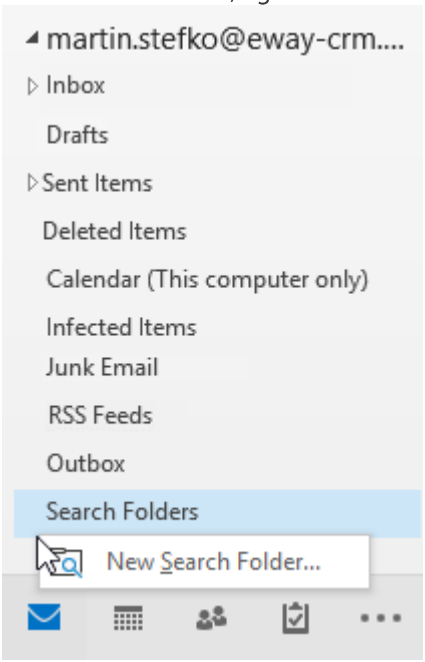
For the purpose of GTD, we first need to create an Inbox in Outlook. A place where we will collect the incoming requests. It is key that we only see the unprocessed requests in the Inbox. It is hard to see which requests have been processed and which haven't within a folder full of mail.

The solution is easy. If you process an e-mail, move it manually into a different folder. You can for example create a folder Processed requests in your Outlook. Every time you process an e-mail, you move it there. Drag-and-drop. It's easy.

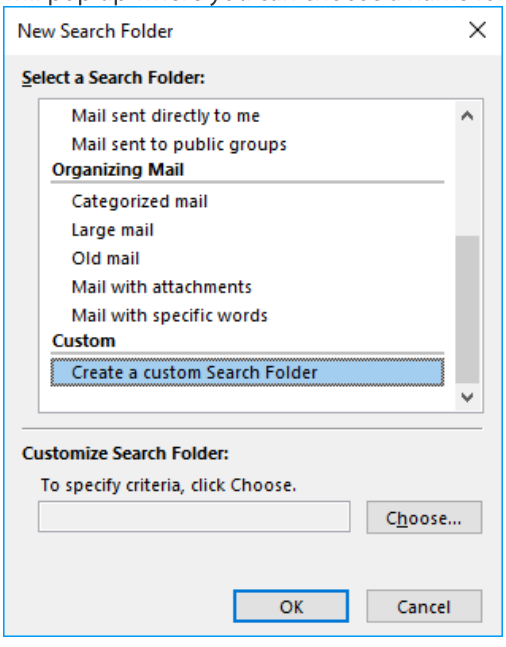
However, there is a more elegant solution using the Search folder. You will create a „view" in your Received e-mails folder so that you can only see e-mails you haven't processed yet. When you process a message, you can easily mark it.

Let's do it:

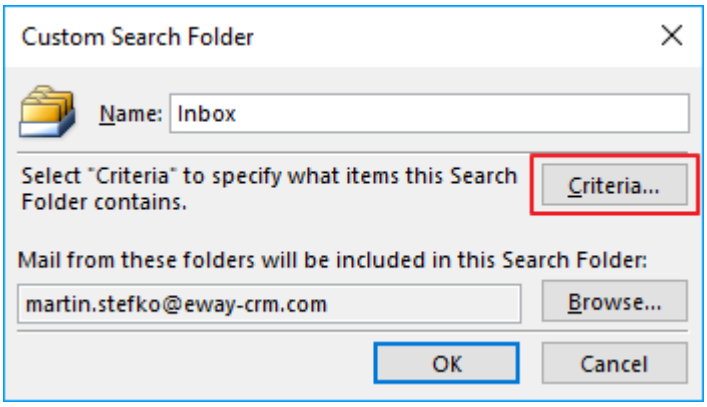
1. In Microsoft Outlook, right-click **Search Folders** and choose **New Search Folder**.



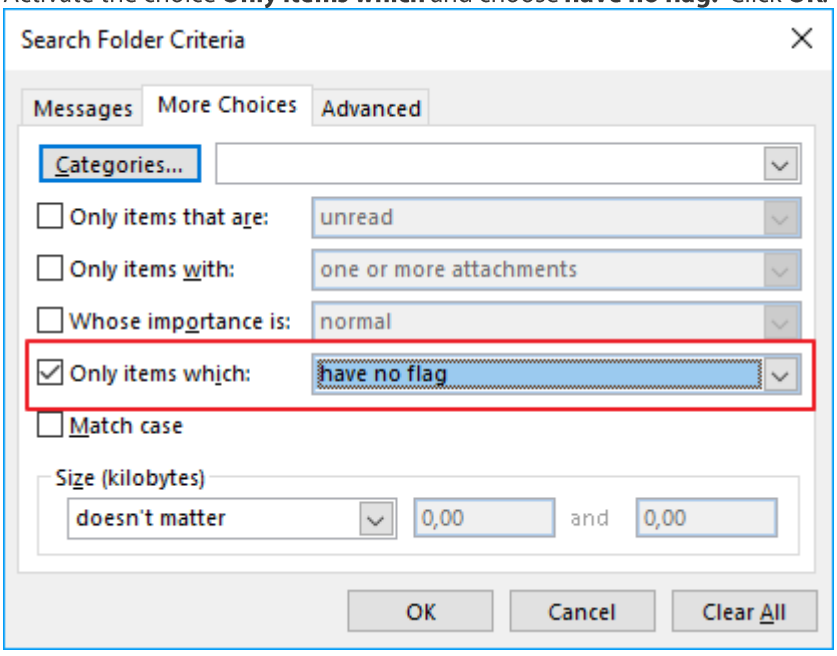
2. In the pop-up window, choose the last option **Create a custom Search Folder**. Double-click your choice. A window will pop up where you can choose a name for your folder. For example, "Inbox".



3. Click **Criteria** and then select **More Choices.**

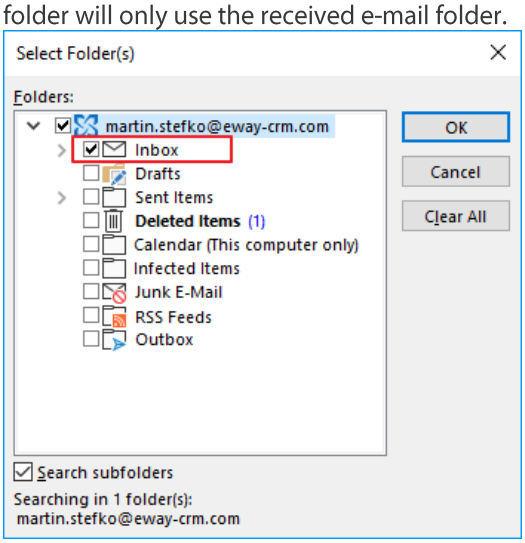


4. Activate the choice **Only items which** and choose **have no flag.** Click **OK**.



5. You will return to **Custom Search Folder**. Click **Browse**.

6. You will see a list of folders in Microsoft Outlook. Check the folder which represents your **received mail**. This way, the folder will only use the received e-mail folder.

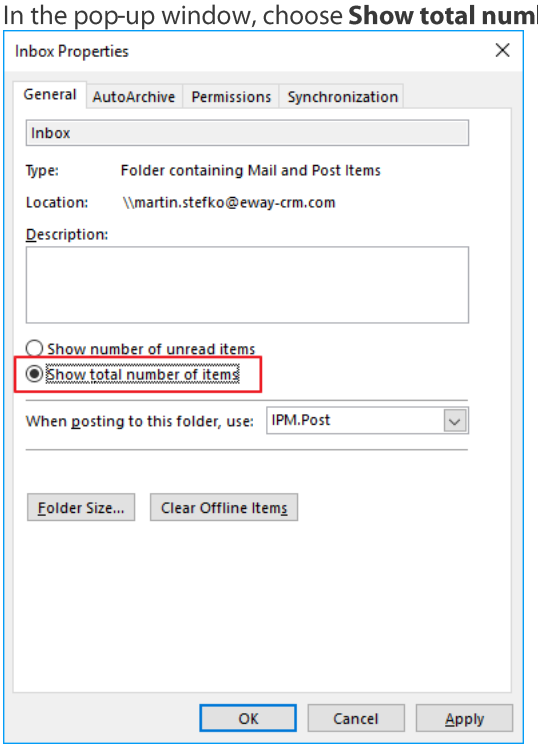


7. Click **OK**.

You have now created a search folder. Using drag-and-drop, you can drag the folder to the favorite items in Outlook. This way you will keep your eyes on it. This is your new Inbox. You will be checking your e-mails here.

Let's make it a little better though.

1. Right-click the Inbox and choose **Properties**.
2. In the pop-up window, choose **Show total number of items**.



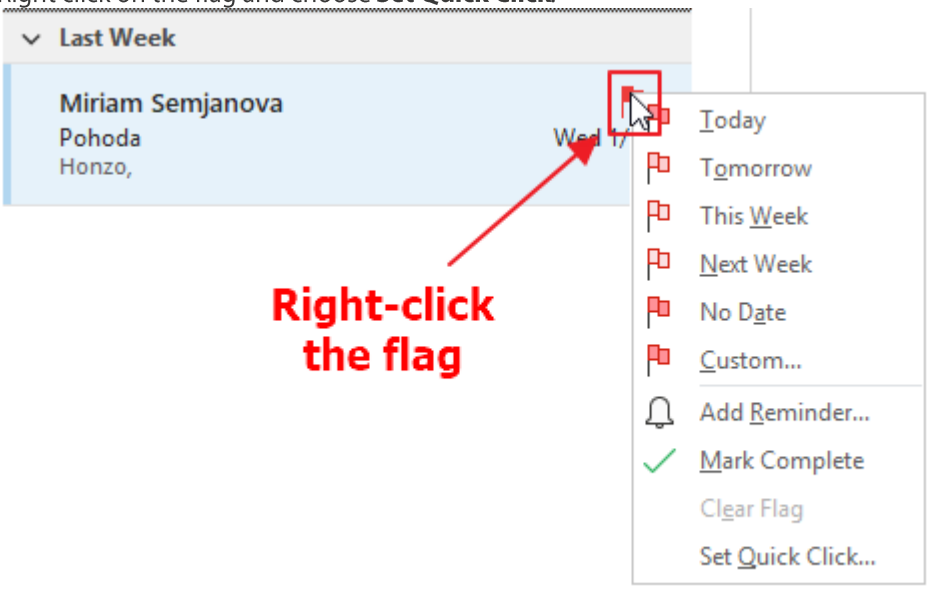
3. Click **OK**.

Next to the name Inbox you will now see the number of e-mails which haven't been processed. By processing an e-mail, the number gets smaller.

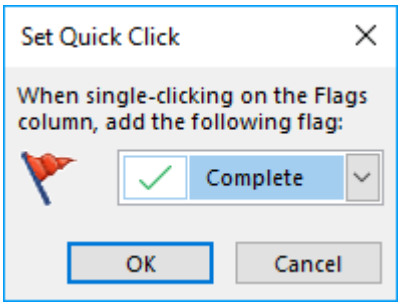
GTD talks about a "zero inbox". That means an "empty inbox". While doing your hourly revisions, clean up your Inbox. Never allow your Inbox contain messages that you will "deal with later on". No. If there is something you want to do later, plan the message for later (Step 3). Otherwise you will have two places with tasks. And that's not good.

Last step – we will set a quick click flag. This way we will be able to mark e-mails as processed by a single click.

1. Point your cursor at an e-mail, resp. a flag which you can see in the top right corner of the message frame.
2. Right click on the flag and choose **Set Quick Click**.



3. In the pop-up window, choose **Complete**. Click **OK**.

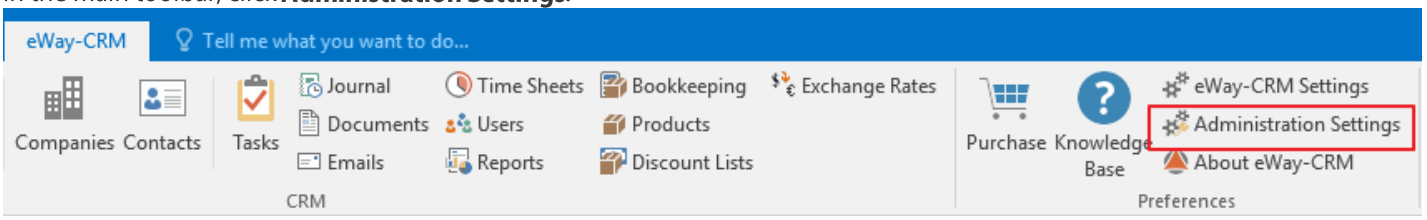


If you left-click a message, (its flag now), the message will be marked as "Processed". That means it will disappear from the Inbox. But not from Outlook. It will still be among your received e-mail with a tick. But not in your Inbox anymore.

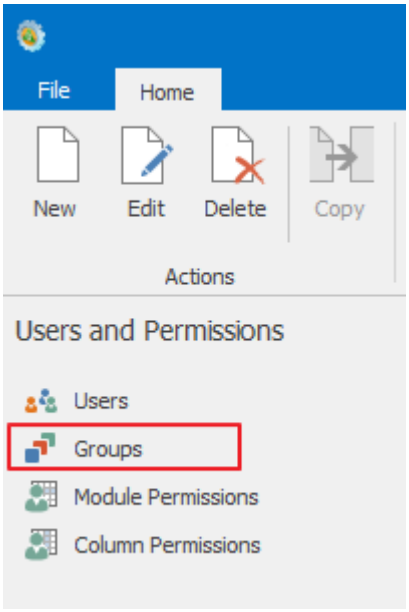
5.2 Preparation – Create categories (contexts)

We use the module Categories for contexts in eWay-CRM.

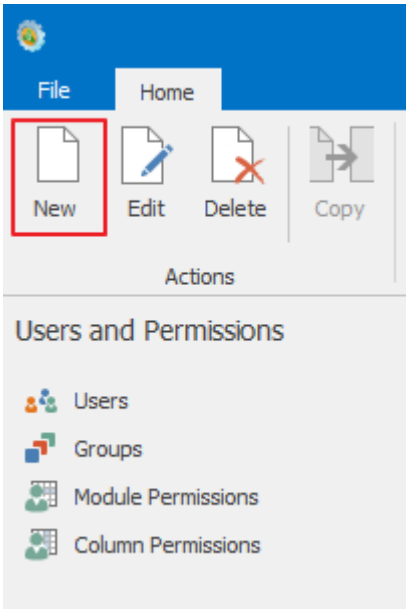
1. In the main toolbar, click **Administration Settings**.



2. Under **Users and Permissions** click **Groups**.

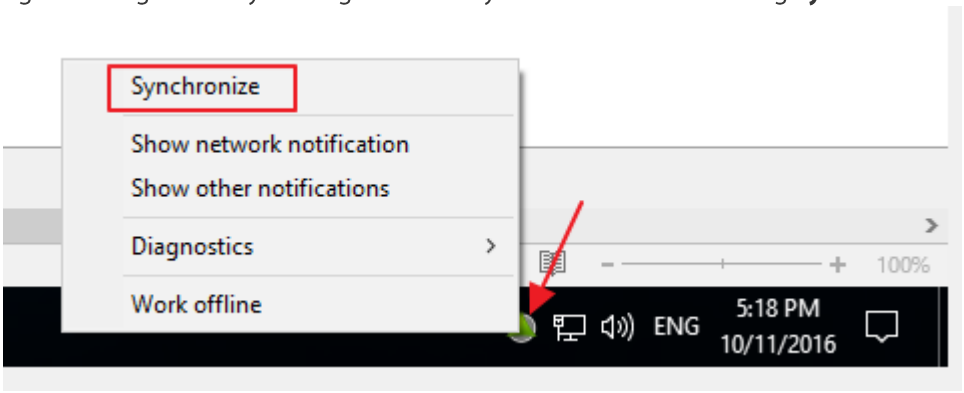


3. Click **New**.



4. Specify the **Group Name**, tick **Is Category** and click OK. You can create categories using the instructions above:
   a. Has to be today
   b. Phone
   c. Email
   d. Office
   e. Read / Think
   f. Control

5. Wait 30 seconds for an automatic synchronization or start the synchronization manually. You can start it manually by right-clicking the eWay-CRM agent on the system ribbon and choosing **Synchronize**.

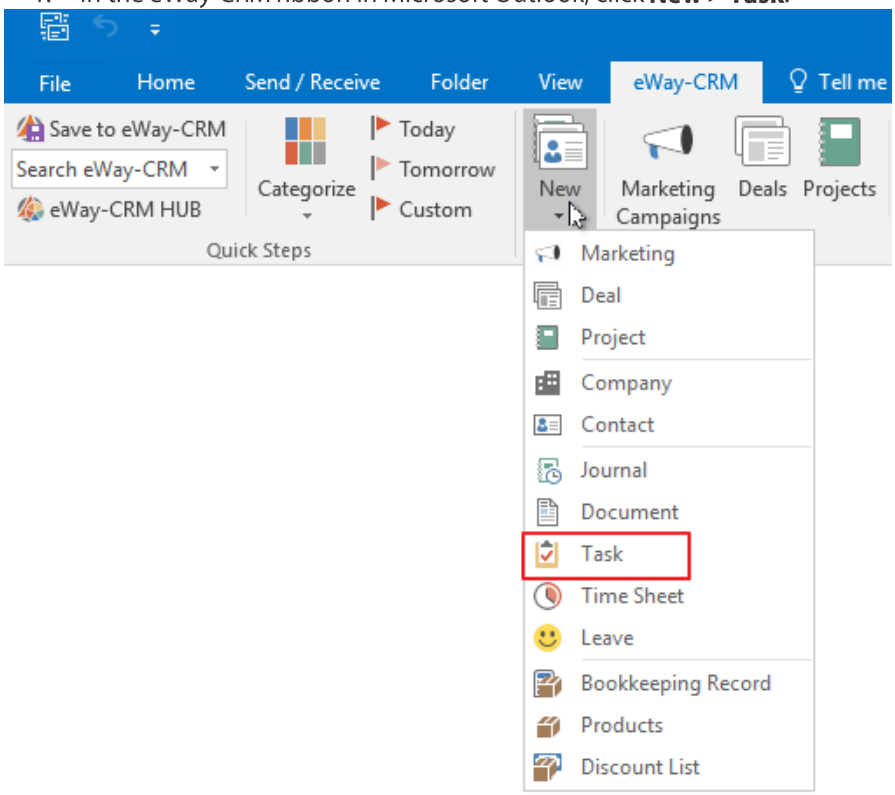


6. You are now ready to start sorting tasks into categories (contexts).

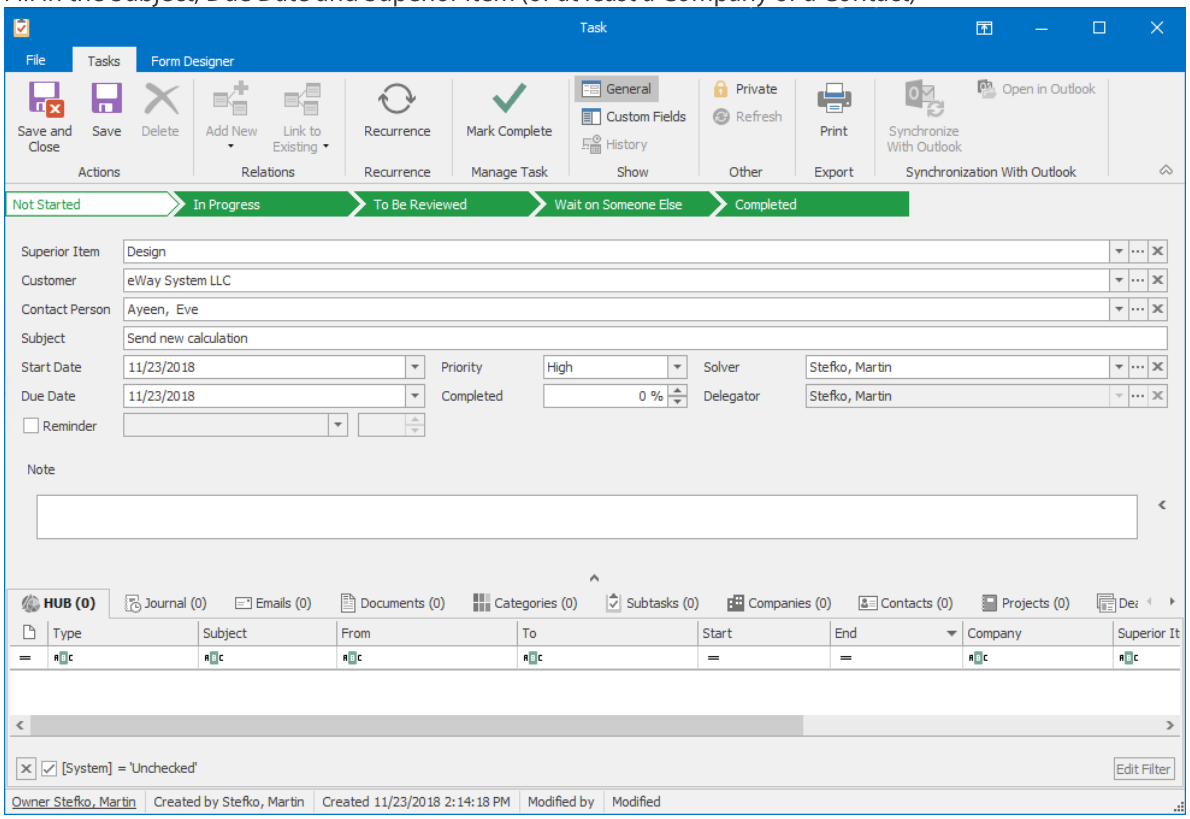
5.3 How to Create a New Task – Manually (Steps 2 and 3 – Recording and Planning)

5.3.1 How to Create a Task in the eWay-CRM ribbon in Microsoft Outlook

1. In the eWay-CRM ribbon in Microsoft Outlook, click **New** > **Task**.



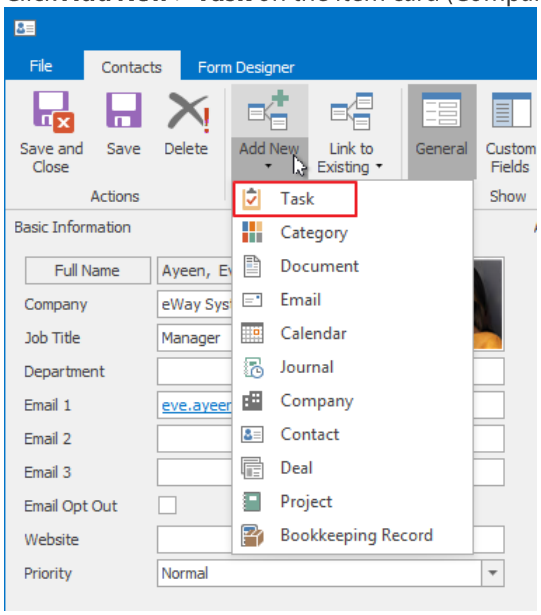
2. Fill in the Subject, Due Date and Superior Item (or at least a Company or a Contact)



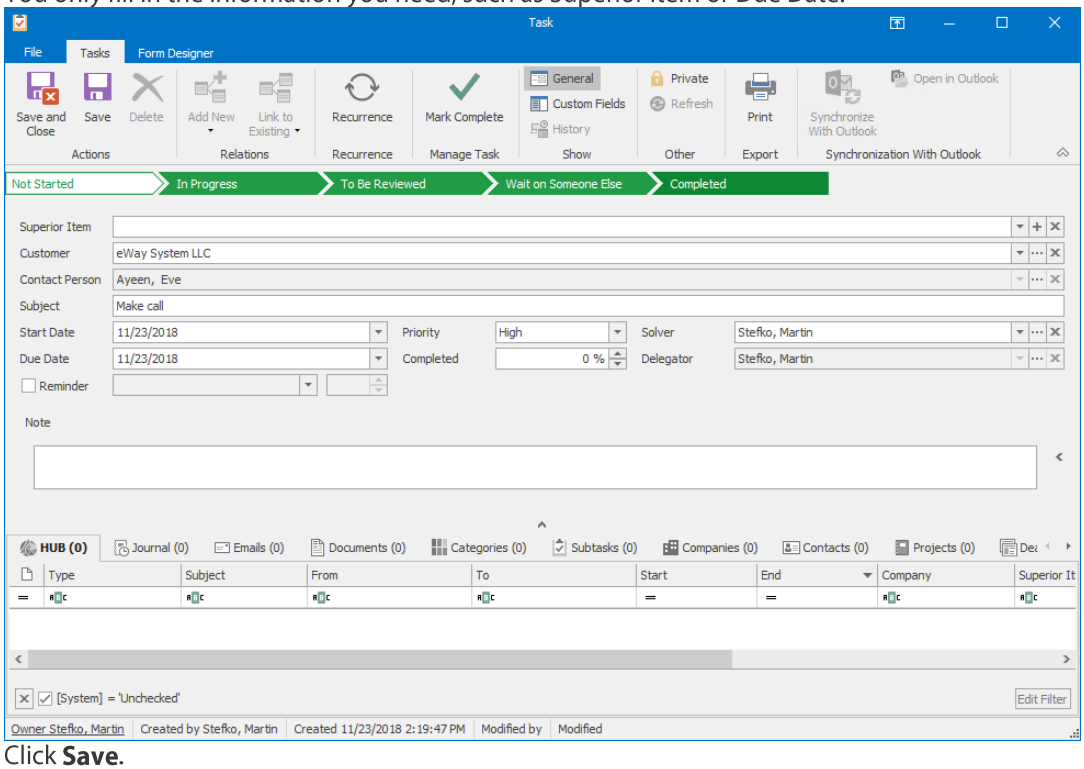
3. Click **Save**.
4. GTD tells us to choose a context (category) for our task. Click **Link to Existing** and choose **Category**.
5. Choose the right one and click **OK**.
6. Save the task one more time.

5.3.2 How to Create a Task from an Item in eWay-CRM (for example Company)

1. Click **Add New** > **Task** on the Item card (Company, Contact etc.)



2. The Item you are using for creating a task will be filled in automatically. Be it a project, the company and contact from the project will fill in as well.
You only fill in the information you need, such as Superior Item or Due Date.



3. Click **Save**.

4. GTD tells us to choose a context (category) for our task. Click **Link to Existing** and choose **Category**.

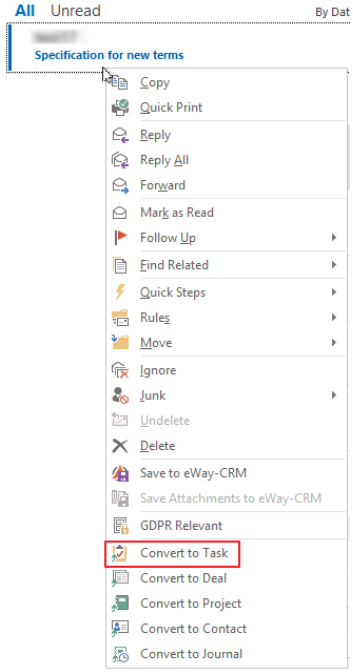
5. Choose the right one and click **OK**.

6. Save the task one more time.

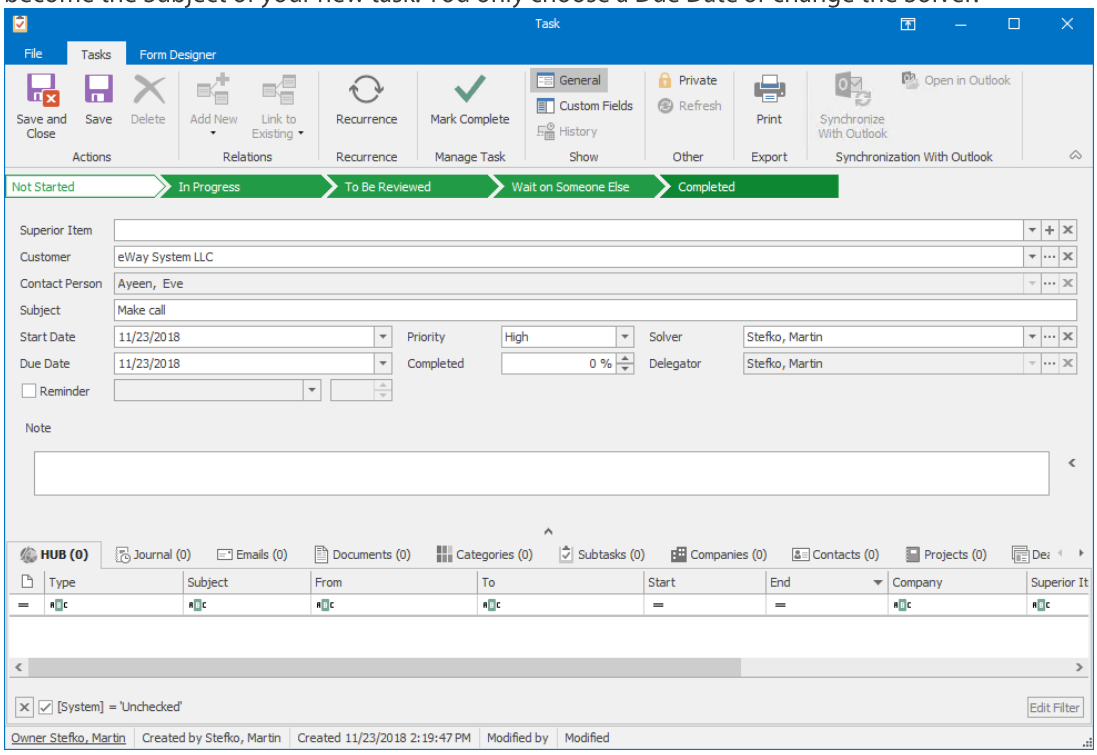
5.4 How to Convert an E-mail to a Task (Steps 2 and 3 – Recording and Planning)

1. Right-click your e-mail

2. Select **Convert to Task**

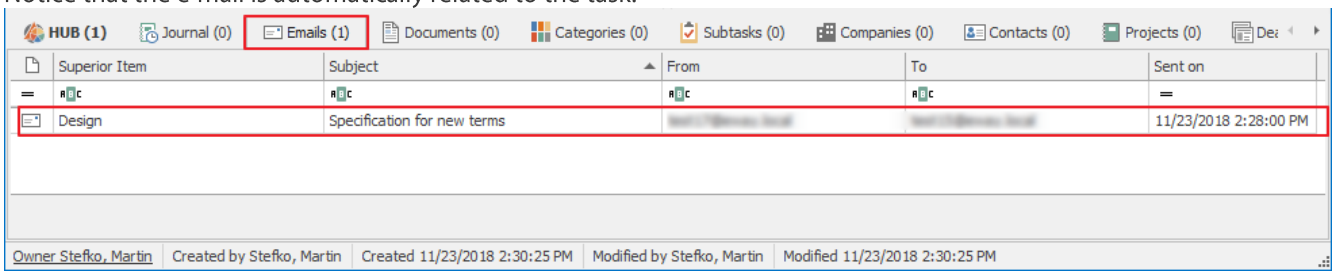


3. If the e-mail has the Superior Item, then the task will automatically have the same Superior Item. The e-mail subject will become the Subject of your new task. You only choose a Due Date or change the Solver.



4. Click **Save**.

5. Notice that the e-mail is automatically related to the task.



6. GTD tells us to choose a context (category) for our task. Click **Link to Existing** and choose **Category**.

7. Choose the right one and click **OK**.

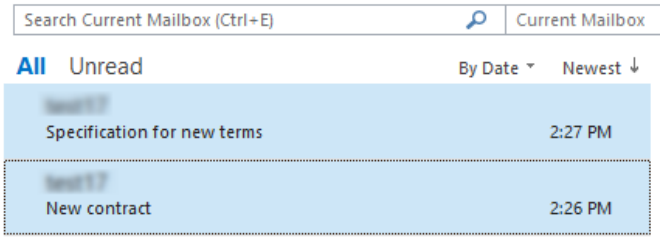
8. Save the task one more time.

5.5 How to QUICKLY Convert E-mail to Task (Step 2 - Recording)

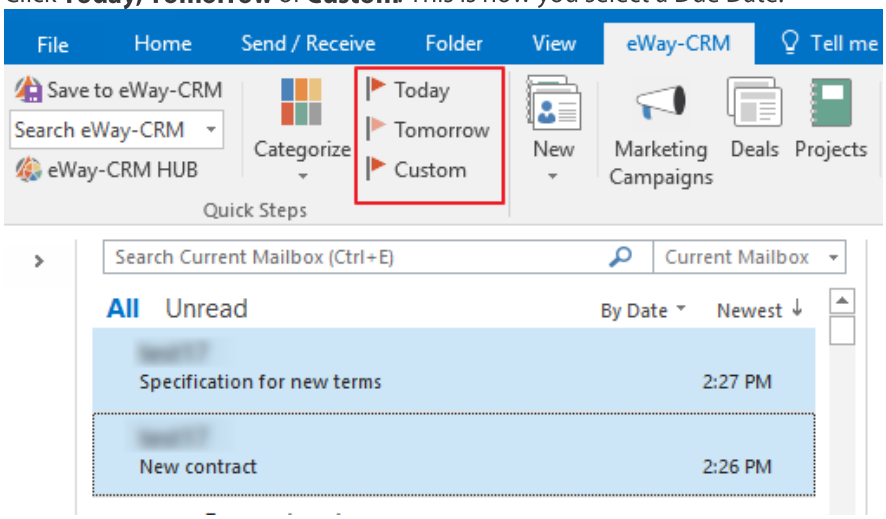
5.5.1 Received E-mail

This function comes in really handy in the morning, when you want to quickly go through your mail and plan how you are going to handle each email.

1. Select one or more e-mails in Outlook.

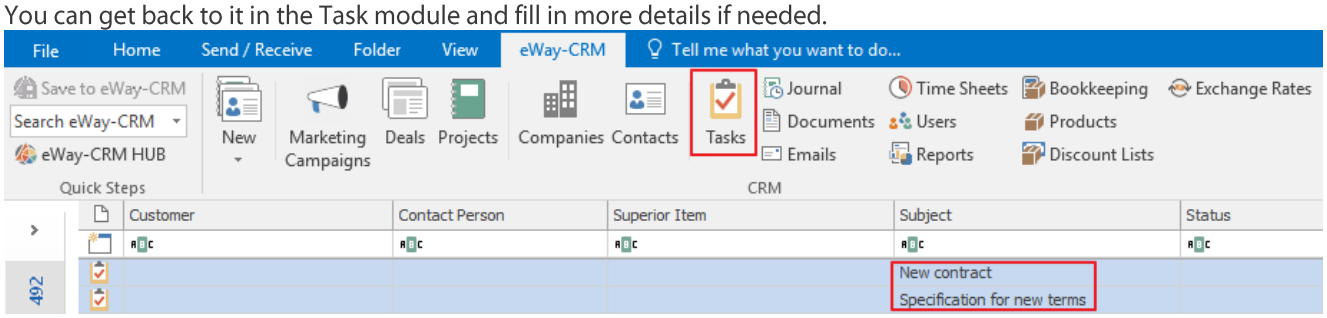


2. In the toolbar, you can see a button **Categorize**. Choose a category. Then we have buttons for quick Due Date setting. Click **Today, Tomorrow** or **Custom**. This is how you select a Due Date.



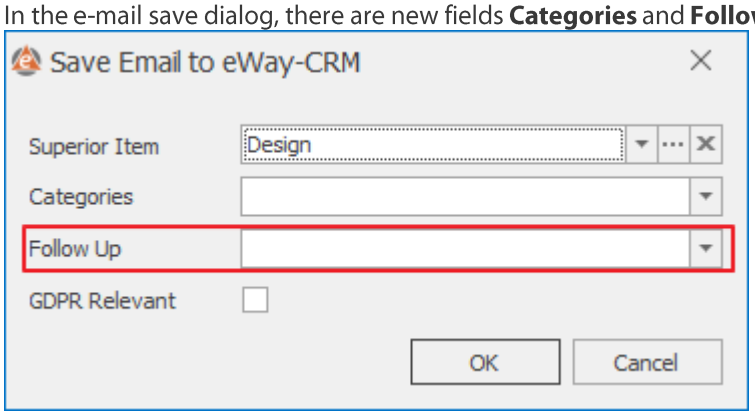
3. The E-mail will be automatically converted to task and becomes related to the task. The e-mail can be found on the task card.

4. You can get back to it in the Task module and fill in more details if needed.

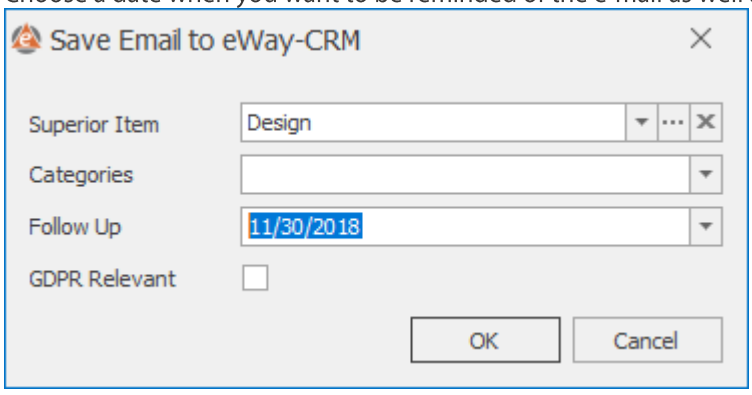


5.5.2 Sent E-mail

1. In the e-mail save dialog, there are new fields **Categories** and **Follow Up**.



2. Choose a date when you want to be reminded of the e-mail as well as a context.



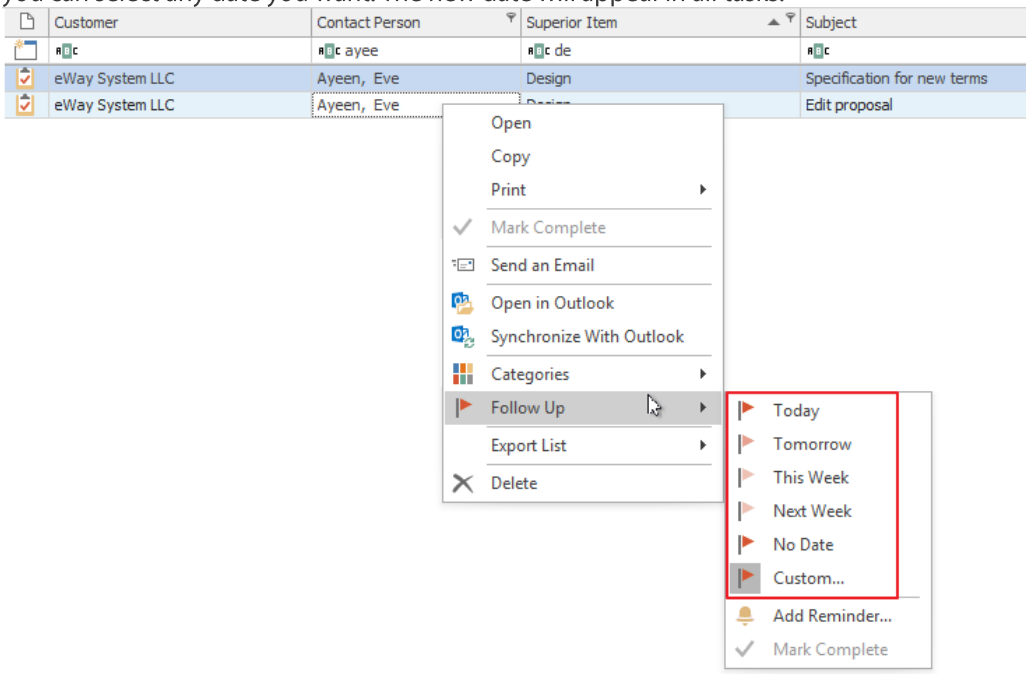
3. Click **OK**.

5.6 How to (Bulk) Change Category (Context) or Due Dates (Step 3 - Planning)

1. In eWay-CRM task list, select one or more tasks and right-click.

2. To change the category, go to **Categorize**. Here you can select or unselect categories for the task. The category will automatically set for all tasks.

3. To change a Due Date, go to **Follow Up**. We have prepared fast choices for you (Today, Tomorrow, …) and Custom. Here you can select any date you want. The new date will appear in all tasks.



5.7 Task Summary in eWay-CRM for Outlook (Step 4 - Review)

For GTD, we will need two views – "GTD today" and "GTD week".

The first view shows the tasks we need to focus on. That means tasks for today and late tasks. Some people like to see tomorrow tasks here as well (to see what they have planned for tomorrow), but that is not necessary.

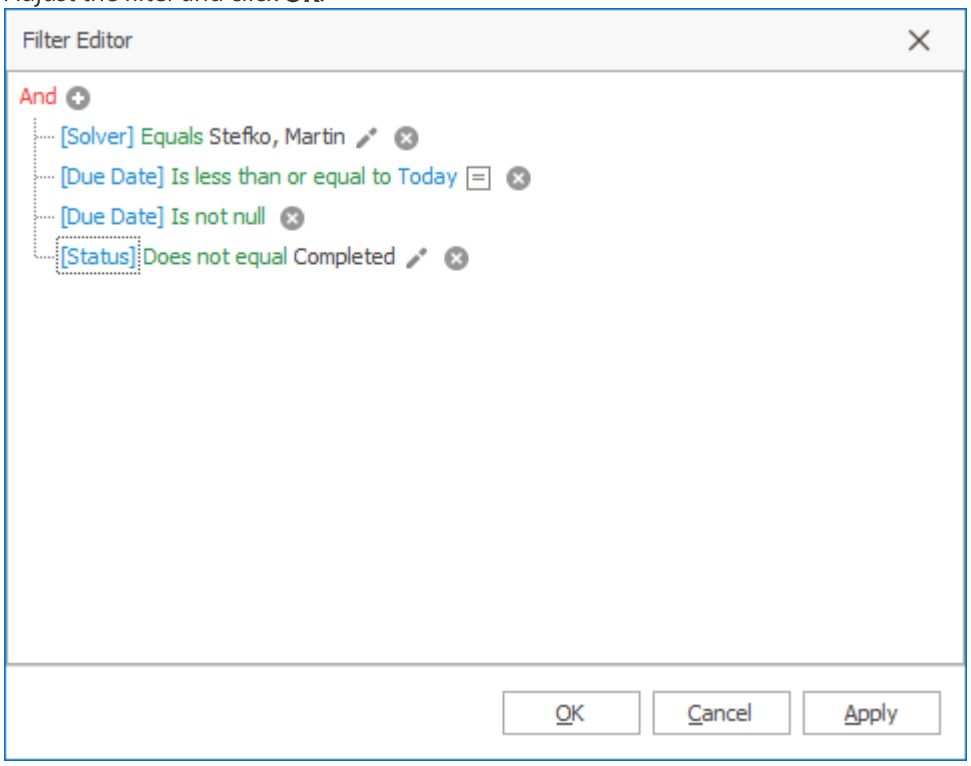
The second view is good for weekly review.

Let's create the views. We will be using functions for working with a list. More information on this topic here.

5.7.1 GTD Today

1. In the task list in eWay-CRM, right-click the heading of any column and click **Column Chooser**.
2. In the bottom right corner, you will see a small window with a list of all columns available. You can add or remove columns using the drag and drop feature.
3. Make sure that your task list contains the columns Superior Item, Company, Subject, Due Date, Solver and Category.
4. In the task list in eWay-CRM, right-click any column heading and select **Filter Editor**.

5. Adjust the filter and click **OK**.



6. You will now probably only see a few open tasks. Let's go to the last step. Right-click the column **Category** and select **Group By This Column.**

7. Your TO DO list could look something like this:

Categories	Customer	Contact Person	Superior Item	Subject	Status	Delegator	Solver
					≠ Completed		= Stefko, Martin
Control							
Control	Owen Mumford Ltd	Zilbert, Seymor	New notification system	Prepare new calculation	Not Started	Stefko, Martin	Stefko, Martin
Control	TesterZ Ltd.	Young, Neil	WizardCOM	Prepare meeting time sheet	Not Started	Stefko, Martin	Stefko, Martin
Email							
Email	TesterZ Ltd.	Young, Neil	Junge	Send new credentials	Not Started	Stefko, Martin	Stefko, Martin
Email	eWay System LLC	Ayeen, Eve	App Test	New terms	To Be Reviewed	Stefko, Martin	Stefko, Martin
Email	Abc Enterprises Inc	Zanella, Gabriele	Sales Center	Send invoice	In Progress	Stefko, Martin	Stefko, Martin
Email	TesterZ Ltd.	Young, Neil	Solara	Call new CEO and set conditions of co-...	Not Started	Stefko, Martin	Stefko, Martin
Has to be today							
Has to be today	TesterZ Ltd.	Young, Neil	Junge	Send new credentials	Not Started	Stefko, Martin	Stefko, Martin
Phone							
Read / Think							
Read / Think	1K Studios	Waycott, Kanisha	1000: Demo - .NET system	New design for web	Not Started	Stefko, Martin	Stefko, Martin

8. Save the filter for later use. If you are an eWay-CRM administrator, you can even share it with other colleagues. See the instructions here.

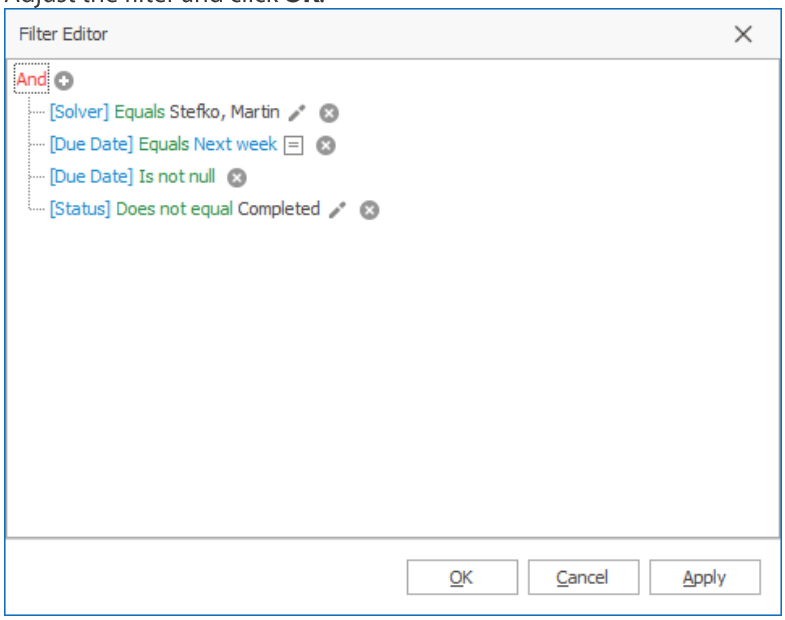
5.7.2 GTD week

This view is very similar to the view GTD Today and some steps are the same. However, we attach full instructions for more clarity.

1. In the task list in eWay-CRM, right-click the heading of any column and click **Column Chooser**.

2. In the bottom right corner, you will see a small window with a list of all columns available. You can add or remove columns using the drag and drop feature.

3. Make sure that your task list contains the columns Superior Item, Company, Subject, Due Date, Solver and Category.
4. In the task list in eWay-CRM, right-click any column heading and select **Filter Editor**.
5. Adjust the filter and click **OK**.



6. You will now probably only see a few open tasks. Let's go to the last step. Right-click the column **Due Date** and select **Group By This Column**.
7. Task will now group by Due Date, not Category. You can put your tasks in order so that the oldest tasks are on the top.
8. Save the filter for later use. The instructions are here.

5.8 Putting it All Together

Now about the whole concept. It's very easy:

1. Recording requests:
   As for e-mails, you can find all of them in your search folder Inbox. As for other requests, that's up to you. It is your decision when you let your colleague talk to you and when you pick up the phone.
2. Processing requests:
   This is easy. When it's an e-mail, you can delete it, forward it or answer immediately. Or plan it.
3. Planning requests:
   In case of e-mails, convert the e-mail to a task. When you convert an e-mail, mark it as Completed. This way it will disappear from your Inbox.

   Other tasks are to be recorded into eWay-CRM manually – see chapter above.
4. Regular work / Task revision:
   Our saved views are perfect for regular work. Always make sure your Inbox is empty, all tasks have a category and none of them are red.

6 Simple and Practical Tips How to Master Your Tasks

Before you start working, we a few pieces of advice for you. As I've mentioned, I've been using this method for more than ten years and I successfully in implemented it into our workplace, where we share this style of work with other colleagues. I led many seminars for our clients and I have received a considerable amount of feedback.

6.1 The Time Management Matrix by Stephen Covey

Stephen Covey describes something called "The Time Management Matrix" in his book The 7 Habits of Highly Effective People (Covey, 2000). Covey presents it as one of his habits and I have adopted it as a little piece of help for thinking before starting a new task.

It is a square with two columns and two rows. The tasks in the left column have a high priority – they are urgent. The tasks in the right column don't have a high priority and they can wait – these are not urgent. The tasks in the first row are important. If we don't complete them, we will definitely feel it sooner or later. The tasks in the second row are not important enough for us to deal with them.

		Priority	
		Urgent	Not Urgent
Importance	Important	1	2
	Not Important	3	4

- Tasks from category 1 are urgent and important.
  An important promise we gave to a client and which will soon be due. For example: "Prepare an offer".

- Tasks from category 2 are urgent but not important.
  We don't need to do them today, they can wait until tomorrow. Or even later. But they are important enough to schedule in the future. For instance: "Implement a module for generating offers in eWay-CRM". Thanks to that, Sales Reps will create offers faster and we will all save loads of time. However, they are already creating offers now, so this can wait a bit. If we manage to do this though, they will become faster and they will have more time for sales.

- Tasks from category 3 are urgent, but it doesn't matter whether we do them personally or not.
  These are so called "candidates for delegating". For example: "Create an invoice" when we have an Accounting Department. It is urgent, because the client needs it. It is even pleasant, because it brings money to the company. But I am a Sales Rep and invoices can be done by colleagues from Accounting just as well. So, I can delegate this task.

- Tasks from category 4 are neither urgent nor important.
  For example answer my girlfriend's message on WhatsApp. My girlfriend sure won't break up with me if I answer during lunch break (at least I hope not!). These "tasks" are only distracting us from our work.

As you have probably noticed, we should focus on the important tasks. And most importantly on tasks from category number 2, because that saves us time for the future. By working on tasks from 2, we will eventually have less tasks in category 1.

With each review, try to realize which category this task belongs to. Before starting an activity (you receive an e-mail with a funny picture from a friend), take a few seconds to decide whether what we are about to do is worth it or not.

6.2 A Task is a Goal and the Goal is SMART

We don't plan tasks so that we can pretend we are working, but in order to achieve something. That is why we focus on the result. On a resulting status: Completed!

When setting goals, there is advice that a goal should be SMART. A task should be SMART as well:

- S for Specific:
  Give the task a specific name. Not "Create an offer" or even worse "Offer," but "Create an offer." Or even better - "Create and send offer." The task should describe what exactly we want to do.

- M for Measurable:
  We have to define the task in a way that it is clear whether we have completed it or not. "Create and send offer" is something that is easily measurable. Did we send it to the client? Yes or no. Another example: "Increase turnover at client XY up to 90 thousand USD a year" instead of "Increase turnover."

- A for Acceptable:
  The task needs a clearly assigned responsible person who agrees to complete it. eWay-CRM represents this with "Solver."

- R for Realistic:
  Do not plan tasks you cannot complete. Plan only realistic tasks. In both of the context of resources and rights (I as a Sales Rep cannot implement a new accounting software within the Financial Department), as well as in the context of time (I won't plan any more tasks for today when I am already overwhelmed).

- T for Timed:
  Every task needs a deadline. in eWay-CRM, we use "Due Date". Make sure the deadline is realistic!

Give yourself SMART tasks, because they help you be effective. Give yourself tasks in order to achieve something - to get from A to B.

6.3 Is Priority Setting Good?

You might have noticed that GTD doesn't work with a priority. While have this parameter on the task card in eWay-CRM, we don't use it often. People tend to set a high priority to non-urgent things. The result is they have everything with an exclamation mark (that is how tasks with high priority are marked in Outlook). Work with contexts and due dates, that's enough.

6.4 A Big Stone vs. a Small Stone

Some time management methods work with the concept of "a big stone and a small stone." This analogy explains that our working day is like a glass jar that can only contain a limited amount of things. If we fill it with sand at first- small tasks, there won't be any space for the big ones. Much more effective is to first put in a few big stones - large and important tasks. Then we add some smaller stones and finally we add some sand. Only this way we can manage to regularly work on the big tasks which matter the most.

This concept is very interesting and can be used for weekly and daily reviews. Big stones are like Covey's tasks from quadrant 2 - important, but non-urgent. If we plan them into individual days at the beginning of the week and then add some less important (although perhaps urgent things), we will start getting things done.

Try it now. Choose some big stones for next week.

6.5 Start with the Most Difficult

Start with the most difficult task in the morning when you are full of energy. These are usually marked as "Has to be completed today."

As soon as you finish the hardest tasks, you will feel relieved. Now it's just the few minor things. Now it will go quickly. You may even help your colleague or start working on tomorrow's tasks. However, to keep the biggest tasks for the end of the day often leads to you going home feeling guilty, because you may have answered ten phone calls, but the piece of an elephant that needs to be chewed is still waiting at the office.

6.6 Cut the Elephant into Pieces

If you need to create and start a new website by the end of the year, it definitely is a challenge that can't be done in a day. It's a job that requires months.

A wise man once said that an elephant can only be eaten by being cut into small pieces which are eaten one by one. If we try to eat the whole elephant at once, we won't succeed.

Same with tasks. Cut them into subtasks. Smaller and smaller pieces that you can work on gradually. One day, you will write down all the requests for a new website, the second day you will make a list of potential suppliers, the third day you will invite them for an interview etc. Step by step, bite by bite.

Cut it into bites only as big as your daily capacity allows. In eWay-CRM, you can list the bites as subtasks.

When cutting, always ask yourself "What do I have to do in order to mark the superior task as completed?" Of course, cutting and cutting forever is not effective. Eventually you will find out that another level of subtasks brings so much bureaucracy that it's not worth it.

6.7 Careful About Multitasking

Some time ago, Time magazine released an interesting article about the toxicity of multitasking, doing more than on things at a time. The article was based on a study done by a group of neurophysiologists who studied its aftermath.
http://time.com/4737286/multitasking-mental-health-stress-texting-depression/

Multitasking, working on multiple tasks at once, is bad. A person's brain is naturally only good in executing one task at a time. When somebody does more than one thing at a time, the person´s brain is actually only switching back and forth - like changing channels on a TV. Changing tasks quickly asks for more energy from our brain and that is why we feel so exhausted at the end of the day.

Avoid multitasking if possible. Do just one thing at a time. Focus on one goal: finish the offer, complete a report for my boss, answer client's question. Do not answer e-mails the moment you get them. Let the telephone ring. You will call back in a minute. Just after you have finished working on your current task. It won't take forever.

Multitasking is bad and I mean it. It distracts us, leaves us extremely tired and prevent us from getting things done. Concentration is key.

6.8 Become a Practical Realist!

Loads of us are natural optimists. Which is good. However, when doing weekly and daily reviews, it's usually not the best thing. When choosing tasks for the day, don't forget to look at your calendar and check whether you have some appointments. Expect the unexpected and save some extra time for phone calls, e-mails and discussions with colleagues. Yes, you can refuse them

with an explanation that you need to work on your own things now, but it is necessary to find a compromise between completing your work and helping your colleagues.

7 Start Now!

There is an old Chinese proverb which says: "The best time to start was twenty years ago. The second best time is now." Do not hesitate. If you want a change, don't wait. Start now!

Begin with setting your Outlook and eWay-CRM according to our instructions and "clean up your Inbox". You will go through old e-mails and process them according to the instructions. You will probably mark most of them as "completed." However, you may find a few you had forgotten. It will take a while, but it will get you to the starting point.

Then start learning a new habit and building a new method step by step, day by day. Process e-mails according to GTD and add tasks from other resources (phones, colleagues etc.). Keep your Inbox empty - clean it at least four times a day.

If you forget your new habit for a while and lose track, nothing happens. You can't expect to be a master straight away. You won't. It will take a lot of energy. But it is possible and if you keep trying, you will have much better results.

"Get your things done."

Stay effective, successful and full of energy for everything that happens in life and work.

Be effective! With GTD in eWay-CRM.

If you want more information about GTD, its implementation within eWay-CRM, or you want to improve in another area, contact us at info@eway-crm.com. *We will be happy to help.*

For those who have only just started with eWay-CRM, we recommend you contacting our Sales Rep at sales@eway-crm.com. We will prepare a free consultation.

8 Books That Inspired Us

Allen, D. (2015). *Getting Things Done: The Art of Stress-Free Productivity.*

Covey, S. R. (2000). *7 Habits of Highly Effective People.*