Workload Management Template Instructions

Presented By:

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Populating Workload Management Cells -

Download the free Excel spreadsheet from www.jeffroberts.info™ and use the following table as a guide to populating the workload management Active Tasks template:

Column	Column Name	Instructions
A	Pri (Priority)	**Cell Input = Enter A, B or C** "A" = Tasks that must complete today (consider limiting the total number of "A" tasks to between three and five tasks maximum). "B" = Tasks you would like to complete today (again, consider limiting the total number of "B" tasks to three maximum). "C" = At the time of evaluation, these tasks have no immediate completion requirement (all tasks that are not "A" or "B" tasks should be labeled as "C" tasks).
B	Pri # (Priority Number)	**Cell Input = Enter 1, 2, 3, 4, or 5** "A" tasks = Assign a numeric value beginning with "1" indicating the task has a higher priority over task "A2." Assign a numeric value to all remaining "A" tasks. "B" tasks = Repeat assigning "B" tasks with numeric values beginning with "1" until all tasks have been assigned a relative numeric value. "C" tasks = Do not assign a numeric value to "C" tasks. They will eventually become "B" or "A" level tasks and will be numerically evaluated at that time.
C	Category	**Cell Input = Enter a meaningful one or two word description relating to the task**. The category should describe an activity you do often, probably no more than ten categories is appropriate. I tend to work on many projects and I want to sort and extract this data at the end of the year. In programming nomenclature, the "category" cell would be considered a high level qualifier. Examples of Category names might be: - Project - Staff - Maintenance - Facilities - Change Management - Follow Up
D	Folder Reference	**Cell Input = Enter the name of the folder (hardcopy or softcopy) containing task-related documents and/or email.**
E	Tasks - Active	**Cell Input = Enter an action statement describing what must be done.** The statement should be concise, containing just enough information to identify the nature of the activity that must be completed.
F	Date Logged	**Cell Input = Enter the date the task first became a priority and was added to the list.** "Date Logged" will assist you with identifying the age of a task during subsequent evaluation. In reality, a high priority today may not be a high priority tomorrow or may be put on hold for an indefinite period. In these cases labeling the task as a "C" priority will enable you to continue carrying the task until a later date while taking little or no action to service the task. At some point a decision must be made as to whether action will be taken or the task will be cancelled outright. Knowing this date will strengthen your argument either way.

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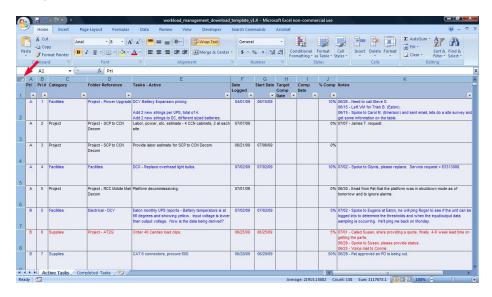| Column	Column Name	Instructions
G	Start Date	**Cell Input = Enter the date when work started on the task.** Color coding the row blue once work begins provides a visual cue for work that is underway within the context of the entire spreadsheet. Color coding the row Red calls out tasks that may be moving up in priority but have not been started yet.
H	Target Comp Date (Target Completion Date)	**Cell Input = Enter the date the task must complete, if any.**
I	Comp Date (Completion Date)	**Cell Input = Enter the date the task actually completed.**
J	% Comp (Percent Complete)	**Cell Input = Once the task starts, continue to adjust the Percent Complete as actions are taken to complete the task.** Percent complete is continually updated during the life of the task and is a best-estimate based on the work that has been completed and work that is still left to be done.
K	Notes	**Cell Input = Enter the most recent status update, action, conversation or other relevant information.** The most recent update is always at the top of the cell and the update is preceded by a date entered in MM/DD format. * Note: Pressing F2 enables cell editing. ALT+Enter inserts a new line within a cell.

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Evaluating Priorities and Sorting -

Using the guide above, populate the fields for all active tasks. Cursor to and select all columns and rows within the spreadsheet as indicated by the red arrow.

Select Sort & Filter>Custom Sort from the ribbon. Ensure the "My data has headers" check box is checked and sort the data by columns "Pri" and "Pri #". Add or delete levels within the sort dialogue box as needed.

Re-evaluate the task priorities and priority numbers and continue to adjust the priorities until a workable plan begins to emerge. Continue resorting by columns "Pri" and "Pri #" until you're satisfied that your highest priorities are at the top of your list followed by your next highest priorities. Throughout your day or week continue to evaluate existing tasks, add new tasks, migrate completed tasks off of the list and re-sort columns "Pri" and "Pri #."

As progress is made toward the completion of each task adjust the Percentage Complete and color code the tasks that are in-progress (Blue for started tasks and Red for aging tasks is suggested). Color coding is a visual cue indicating task status and gives an overall impression of workload progress or lack thereof. Update the Notes section with the last status updates (the latest status note is always at the top of the Notes cell).

Filtering -

Filter specific columns to obtain a different view of your priorities, paying particular attention to the columns labeled Category and Target Completion. Filtering the Category column will display tasks with similar characteristics and may cause you to readjust your priorities. Filtering the Target Completion column will bring time-dependent tasks into view and may also cause you to re-evaluate your priorities.

Completing a Task -

When a task reaches 100% complete, cut and paste the task into the "Completed Tasks" tab and re-sort the Active Tasks spreadsheet. This process repeats as tasks are added, cancelled or moved to the Completed Tasks workbook tab.