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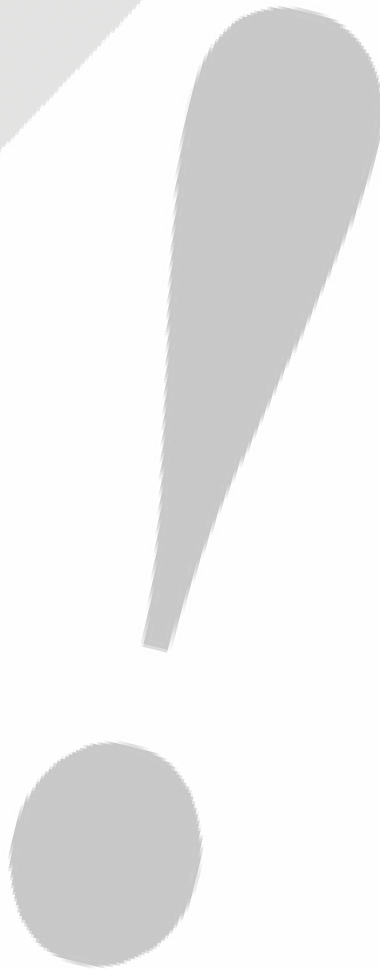OVE
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Your Business Potential

Beware The Four To-Do Lists

FP *advance*

Beware The Four To-Do Lists

Whatever you do, get all of your to-dos into one master to-do list. If you don't do this you'll be deluding yourself about what's on your plate.

Here are four places I realised I had to-dos hiding:

Beware The Four To-Do Lists

1 - My to-do list

The first one was my actual to-do list. I'm assuming you have a to-do list somewhere as well. It might be paper-based, or a list in Outlook, or on your computer somewhere.

2 - My task sharing software

The second place I found some to-dos was in my task sharing software, called Wrike. Because the team at FP Advance are virtual and dotted all over the globe we need a tool for sharing tasks where more than one person is involved. Wrike is that tool.

In your business, you might have a different task sharing tool, like Trello or Basecamp, which I know some people use, or maybe you use Wrike too.

Or maybe you have tasks in your back office system as work passes through each phase of production in the Financial Planning process. So be sure to look for hidden to-dos in whichever system you use.

3 - In my emails

The third place I found to-dos was in my emails

I didn't even realise I was using my emails as a de facto to-do list.

I checked my emails regularly and if I couldn't deal with the email straight away I'd leave it in my inbox so I wouldn't forget it.

Sound familiar? Do you do this too?

Almost everyone I know does it.

Even as I describe this, I reckon you can see the problem.

Once you have more than a dozen emails waiting to be dealt with, they disappear off the front page and now you have to go scrolling through your emails every so often, looking for the ones that need action that are still not dealt with.

The truth is you might go back to some of these emails multiple times over days and weeks. That's not something that sounds very productive, does it? And it's not.

Beware The Four To-Do Lists

4 - My weekly leadership team meeting

The final place I found some to-dos lurking was as a result of my weekly leadership team meeting.

When we hold our weekly meeting there are always a few to-dos, and these need to be completed in 7 days by the time of the next leadership team meeting.

However, I wasn't adding these to my master to-do list, because I didn't yet have one. That meant sometimes I'd get to the weekly meeting and think, "Oh no, I've forgotten to do my to-dos". Not a good look.

Can you sense why I didn't really want to pull all of these to-dos into one place?

Already you can imagine how many to-dos there are going to be when I pull them all together. Bucketloads !!!

Are you feeling that same sense of trepidation?

Fear not. It's actually liberating to get them all out into the open.

Here are a few things I need you to do:

a.) Make a quick list of where you think your to-dos might hide.
I just want you to see if you have four to-do lists as I did.

b.) Decide on one place that to-dos will live from now on; a master to-do list in effect.
In my business, I store them all in Wrike. That tool allows me to move them around to different dates and deadlines, and also to share them with other people in my organisation, without losing track of them.

I'm not necessarily suggesting you use that tool too. You might have your own tool already in place. Or your back office system might be able to perform that role for you. Or maybe you just use Outlook or something else that's pretty mainstream.

I don't mind what you use, but it has to be the place that every single task or to-do will live from now on.

Beware The Four To-Do Lists

c.) Once you've decided what that tool is, get all the to-dos onto that one master list.

How does it feel to see everything you need to do in one place?

It might feel or a bit scary, or even completely overwhelming. Please don't panic if that's how you're feeling right now. I'm going to give you the tools to work your way through all of this. For some people, it might even feel empowering.

I know that once I got over the initial shock of how much I had to get done, it was like a light bulb moment. Now I knew why I was always having to work that extra hour or two every so often. It showed me why I was never quite in as good a shape as I thought I was. That was a bit of an epiphany.

Now that I could see the problem, I could actually do something about it.

And now you'll be able to do something about it too.