

# How to Avoid the Lost Assignment and Task Epidemic (LATE)

Frank Potter, CMA, MBA

## The LATE Problem

The boss is at the door asking where that thing is you discussed a month ago. The panic begins to rise because you barely remember the assignment! Wait, you gave it to Bob, but he just left on a 6-week vacation to the Himalayas and forgot to email you his files from his hard drive. It looks like you will be recreating Bob's analysis – better phone home because you are working late, again.

If you have been in this situation, then you may be part of the Lost-Assignment and Task Epidemic (or LATE). While LATE-ness has no known cure, there is relief. You can manage LATE situations through some basic principles, a centralized list, readily available technology and a bit of discipline by you and your team members in keeping the TASK list up to date.

## Seven Treatment Principles

LATE-ness relief uses seven treatment principles. These principles are applied equally to either an issue you need to resolve or a TASK you need to complete (for simplicity, the word 'TASK' has been used to mean both.) If these principles seem familiar to you, it is because they have been adapted from content/record/project management concepts.

### 1. Tasking supports, but does not replace, good leadership.

Tasking is a tool, it will not fix a broken or dysfunctional leader. Good leaders will re-invest their productivity gains into their teams.

### 2. Start with the end in mind.

Opening a TASK is easy but closing it is hard. It is all about the close.

### 3. Know when to task.

Circumstances vary but consider tasking anything that will take more than 2-4 hours to complete, or as a manager think it might have future potential importance.

### 4. Learn, but move on.

Start small. Learn and scale as you understand the method and technology. You can start getting LATE relief in about an hour.

### 5. One list, many years.

Have one list, a single source of truth, which crosses multiple years. Use this list for continuous improvement and to practice good leadership.

### 6. Pick a technology and stick with it... until you find something better.

Start with technology readily available, for example your email system



or collaboration tools, such as Microsoft SharePoint.

### 7. Take 5-minutes to document early and thoroughly... then update-update.

Write down the 'rules of engagement' of how you will manage LATE-ness through tasking for your staff and yourself. Constantly refine and improve your methodology by updating this documentation.

Budget and Financial Operations Unit - Current Task and Issue List						Manager or Assigned Staff Member weekly updates.	
Task-Issue	Assigned	Status	Priority	Summary	Directory	Weekly-Summary	Year
<a href="#">ABC.Develop New-Endeavor Cost</a>	Sam Steele	In Progress	Medium	Develop a cost to launch the 'New-Endeavor' program in Fall of 2099.	<a href="#">ABC-Client Support</a>	18-APR: Meeting with ABC Director to understand scope of the Program, may be deferred with other organizational changes. 11-APR, NEW: Minister is proposing creating a New-Endeavor Program. Unit will prepare Costing.	2096-97
<a href="#">MIN.Manage New Minister Briefing</a>	Frank Potter	In Progress	High	Manage the Finance portions of the Briefing Binder for the new Minister.	<a href="#">MIN-Budget</a>	18-APR: Minister Smith resigned, new Minister (Jones) appointed. 11-APR, NEW: Request to update Briefing Binder by the Deputy Minister based on current challenges faced by Minister Smith.	2096-97
<a href="#">WID.Prepare Forecast BN</a>	Frank Potter	Completed	High	Prepare BN for the CFO on Widget Division's Budget Pressure.	<a href="#">Briefing Notes</a>	18-APR, CLOSE: BN provided to the CFO and Director of Widgets. 11-APR, RE-OPENED: CFO reminded of this deferred Task, instructed to re-open. 14-FEB, DEFER: Director of Widgets and DM to discuss at Spring Retreat. 07-FEB <- 17-JAN: Ongoing. 10-JAN: Contacted the Director of Widgets, waiting for a response. 03-JAN, NEW: BN on Widget Division's budget pressures and action plan requested by the CFO.	2096-97

Figure 1: Week's End Task Status Report (for April 18)

Task-Issue	WID.Prepare Forecast BN	Use the 'Task-Issue' in the subject line of emails.
Assigned-To	Frank Potter	
Status	Completed	Keep this simple, e.g. In Progress, Deferred & Completed
Priority	High	
Summary	Prepare BN for the CFO on Widget Division's Budget Pressure.	
<p>To: Frank - From: Jane                  Date: January 3                  Subject: WID.Prepare Forecast BN                  Thanks Frank, this looks good. There are other issues at the executive team level that may change the request but start with speaking to the Director of Widgets Division.</p> <p>To: Jane - From: Frank                  Date: January 2                  Subject : WID.Prepare Forecast BN                  Hello Jane, thanks for the visit today. Further to your request, my staff will prepare a briefing note (BN) of why the Widget Division is Forecasted to be \$500,000 over budget. I will have the BN to you Monday assuming George, the Director of the Widget Division is available and can provide background and information. I am assuming you are the primary audience for the BN with a copy to the Director of Widgets. Please advise if I have understood the request.</p>		
Description		
Directory	<a href="#">Briefing Notes</a>	
<p>18-APR, CLOSE: BN provided to the CFO and Director of Widgets.                  11-APR, RE-OPENED: CFO reminded of this deferred Task, instructed to re-open.                  14-FEB, DEFER: Director of Widgets and DM to discuss at Spring Retreat.                  07-FEB &lt;- 17-JAN: Ongoing.                  10-JAN: Contacted the Director of Widgets, waiting for a response.                  03-JAN, NEW: BN on Widget Division's budget pressures and action plan requested by the CFO.</p>		
Weekly-Summary		
Unit	Map each Task against any larger operational plans you need to report against. Great for performance reviews (and resume writing!)	
Mandate	Client Support	
FYear	2096-97	

Figure 2: Sample Task Detail

### What Does LATE-Relief Look Like?

Before getting into a specific example, let's start with what the end result may look like after you implement LATE-Relief. You will have a centralized list of all tasks available to your team members, ideally via a web-based technology rather than a file (remember, a single source of truth.) You will ask your team to update their tasks weekly and then you will email out this list every Friday to your team, boss and other interested parties. The graphic below shows the state of affairs for a Budget and Financial Operations Unit on Friday, April 18th, 2099.

After sending out the weekly-status report, closed items (e.g. 18-APR, CLOSE) will have their status set to 'Completed'. This will filter them from appearing in the following week's report. While the list in Figure 1 shows a summary view of all In-Progress Tasks, each TASK may have more detailed information about its origin, assignment or work done to close the TASK. For example, the following graphic shows the full entry for the "WID. Prepare Forecast BN" TASK.

### Tasking – The Discipline Part

To recap the tasking methodology, you will have a web-based-list of what you are working on and each item on the list contains some additional detail. Reference this list on your tablet (if you are old-school, print it off) and make updates throughout the week as a constant reminder of what the team is working on. You and your team members will go to the list and update the Weekly-Summary with a sentence or two. If a TASK seems similar, check back to see how you responded in the months or years gone by.

At this point you might be thinking: ARE YOU NUTS! The cure for LATE-ness seems worse than the disease. What is the payback for all of this effort? To start, you are probably practicing some or all of the principles and methods, so the incremental effort is likely low. As well, how about 20-30% more capacity without hiring more staff? An often cited estimate is that knowledge workers spend about 20-30% of their time looking for information. Tasking provides context and a structure to frame the documents created (e.g.

working papers) or the emails sent. When the boss is at the door and Bob is in the Himalayas, you can quickly find the content through this structure.

### Widget Division Example

Jane, the Chief Financial Officer (aka the boss) pops by your office just after New Year's. She mentions that the Widget Division has some budget pressures and that you should write up a briefing note explaining their cause and an action plan to deal with them. Unfortunately she is gone before you have a chance to get more details or background.

At this point, what would you do? LATE would have us madly writing the briefing note, pulling financial reports and attempting to understand, "which variance is to be explained?", and, "who is the audience for the briefing?" The briefing notes would go back and forth between you and Jane and months later she would be at your door asking what its status is. Alternatively, you can TASK IT.

### TASK IT

Figure 2 is the TASK for this scenario. Copied into the description field is an email to Jane confirming that the request was understood and a suggested completion timeframe. Note the subject line of the email is the same as the TASK Name. This is Jane's opportunity to accept the TASK as is, provide more detail or make other corrections (see her reply from January 3rd).

Back to principle 1... *tasking does not replace good leadership.* With a healthy tasking methodology, consider doing the following.

#### 1. Starting a TASK:

Confirm the "ask" before starting or assigning work (e.g. the confirmation email to Jane about the Widget division.)

#### 2. Seek Permission to Lead:

Ask the assignee of the TASK, "Do you understand and can you do the TASK considering your other priorities?"

#### 3. MBWA:

Use the TASK list to support Management By Walking Around. Chat with your staff about impediments to accomplishing their tasks. Watch for stealth or hidden work by

asking “Is there something that you are doing that is not on the list?”

#### 4. Weekly Updates:

A weekly update should take about 5-30 minutes from you and your staff members (results may vary based on the number of assigned tasks.)

#### 5. Closing or Deferring a TASK:

Be ruthless in closing or deferring tasks. Tasks that drag on for months degrade the entire process. Remember principle 2... *it is all about the close.*

#### 6. Check Back on Deferrals:

Periodically (e.g. monthly or quarterly) revisit deferred tasks with your staff and your boss.

#### 7. Roll Forward the Fiscal Year:

Leave your mistakes behind you. Any open tasks from previous fiscal years are moved forward to the new fiscal year (see the Side Bar\* about rolling forward your network drive at the same time.)

#### 8. Lather, Rinse, Repeat and Learn:

Constantly work with your boss and your staff to make tasking easier to comply with and ensure the process is adding value. Per principle 7... *Update-Update-Update* - document changes.

### Using Technology Readily at Hand

What technology can be used to accomplish the above? Microsoft SharePoint, Outlook and public folders on an Exchange Server can get you started. If your organization uses other standards (e.g. Lotus Notes or Gmail) you may need to adapt your methods accordingly. The methodology is scalable to larger or multiple teams however the technology may need to be customized and become more sophisticated.

### Operations Versus Tasks

Where exactly does an operational activity begin and an ad hoc TASK end. Is year- or month- end a TASK or an operational activity? Generally, it would be suitable to keep a single ‘over-arching’ TASK for an operational activity such as month-end. For instance a year-end issue log will track year-end “tasks” rather than the above list.

### \*Side Bar – Organizing your Network Drive

A common problem for finance departments is how to structure and store their electronic documents. Some organizations use content management solutions but more than likely, Finance has a file server on a network using a Windows operating system which is organized into directories.

This 40+ year old content management technology is showing its age. To start, it is a passive system whereby a file saved on a directory remains there until someone does something with it. Next, the technology assumes a linear, deductive hierarchical organization for documents on file servers. Thus a file may need to be saved multiple times if it crosses multiple business interests (using short cuts can help with this.) Finally, user controls are finicky. Either an organization will allow a free-for-all in creating/managing folders or it imposes centralized and draconian controls.

Structure and documentation can help finance departments manage and leverage their electronic assets. The following 6 principles can get you started.

#### Principle 1: Time is of the essence.

- Make time your primary unit of organization in the network drive. Do not co-mingle those long forgotten projects, tasks and activities with current year efforts.
- This allows the organization to apply a crude record retention policy.
- For optimal sorting, adopt the yyyy-mm-dd date format.

#### Principle 2: One sub-folder for each core function, e.g. Month-End, Quarter-End, Procurement, Budgets, Staffing, Task and DocDump folders.

- Core functions are further sub-divided, e.g. *Month-End* (January, February... December) or *Budget* (Initial Planning, Client Working Papers, Approval, etc.).
- The ‘Staffing’ folder is for non-personal files such as job descriptions.

#### Principle 3: Store Close to the Core but have Contingency Locations.

- Returning to the main article, a TASK which supports a core function (e.g. procurement) should be stored in that core function folder.
- For example, work done on a RFP might be stored here:
  - Finance/FY2098-99/Procurement/ABC-RFP-1345\_TP-Supplier
  - [Department]/[Fiscal Year]/[Core Function]/[Document]
  - the above can be converted to a hyperlink and saved in the TASK.
- The ‘TASK’ folder is the folder of last resort when a TASK does not quite fit into a core function.

#### Principle 4: It is all about the Close (and the Finished Products.)

- The first 10 or so files/folders occupy the most valuable real estate of a folder.
- The final finished product should be front and centre.
- Intersperse ‘zArchive’ folders throughout the directories. Earlier versions of the finished products, transitory documents are all saved to the zArchive with only the final/finished documents stored at a higher level. zArchive directories are first to be deleted when disk space is tight or as part of an annual directory clean up.
- DocDump - Do you ever get those hard to classify documents, such as a strategic plan by a sister organization or an interesting article? You want to save it, but where? The role of this folder is to store ‘FYI’ documents that don’t quite fit anywhere above. Ensure the file name is intuitive enough so it shows up in search.

#### Principle 5: Write the User Documentation First before Building the Directory.

- Document how your team will organize its directories and what type of files will go in each one. (Download a template to get you started at [www.myorgbio.org](http://www.myorgbio.org).)

**Task: Immediate Benefits and Your Legacy**

For the initial investment of a few hours and some ongoing-continuous improvement, you can quickly have a TASK tracking system. Some of the benefits you may experience by treating LATE-ness include:

- not having to work late to recreate and reinvent the same work, particularly if combined with a good network drive strategy;
- support of organization planning, resource and priority setting;
- assistance in moving to a more robust records or content management system in the future;
- making use of simple and readily available technologies as discussed that can support most 5-30 person finance teams (larger teams can use the same principles but will need to invest in more robust technologies;) and,
- augmentation of staff training and opportunity planning is a great way to keep your resume up to date.

To the last point, eventually move on and the TASK list can be your legacy to your successor. It can provide a multi-year overview of what you did, how it was done and where to find it. Remember the principles, start small, socialize the idea and then scale as you become comfortable with the technologies and methods.

**About the Author**

Frank Potter is a professional accountant (CMA) and holds a MBA from the University of Athabasca. He is currently with the Ministry of Alberta Health and is the Director of Strategic Planning for Information Management and Technology. Previous to this he has held variety roles, typically at the Director level, within governmental and consulting organizations. Contact: [www.myorgbio.org](http://www.myorgbio.org) or [frank@myorgbio.org](mailto:frank@myorgbio.org).



- Create a Template-Directory. This is the shell that you will copy each year and use as the basis for next year’s directory. After documenting changes, this should be the first directory that is updated (before changing your current working directories.)
- Part of the documentation should include standards. For example, avoid using spaces in naming folders and files. If you reference a folder/file name with spaces via a web-based tool (such as Microsoft SharePoint for managing tasks), a space is replaced with the “%20” value. This creates long and clumsy file/folder names. Use dots “.”, hyphens “-” and underscores “\_” instead.

**Principle 6: But What about the Existing Directories?**

- Move all of your current folders/files to a directory called “zzDeleteMe-20xx-12-31” and set that directory to be read only.
- If the team needs a file from this directory, move only the required file to the new structure.
- Let it be known that this directory will be deleted on a specific date; e.g. on 2029-12-31.
- Concurrently, there are system tools (or inexpensive intern labour) which can be used to identify “for deletion” files that are already well past their retention/destruction threshold.

For more information, visit [www.myorgbio.org](http://www.myorgbio.org) for the Director’s cut of this article and other blogs and articles on Finance and organizations.

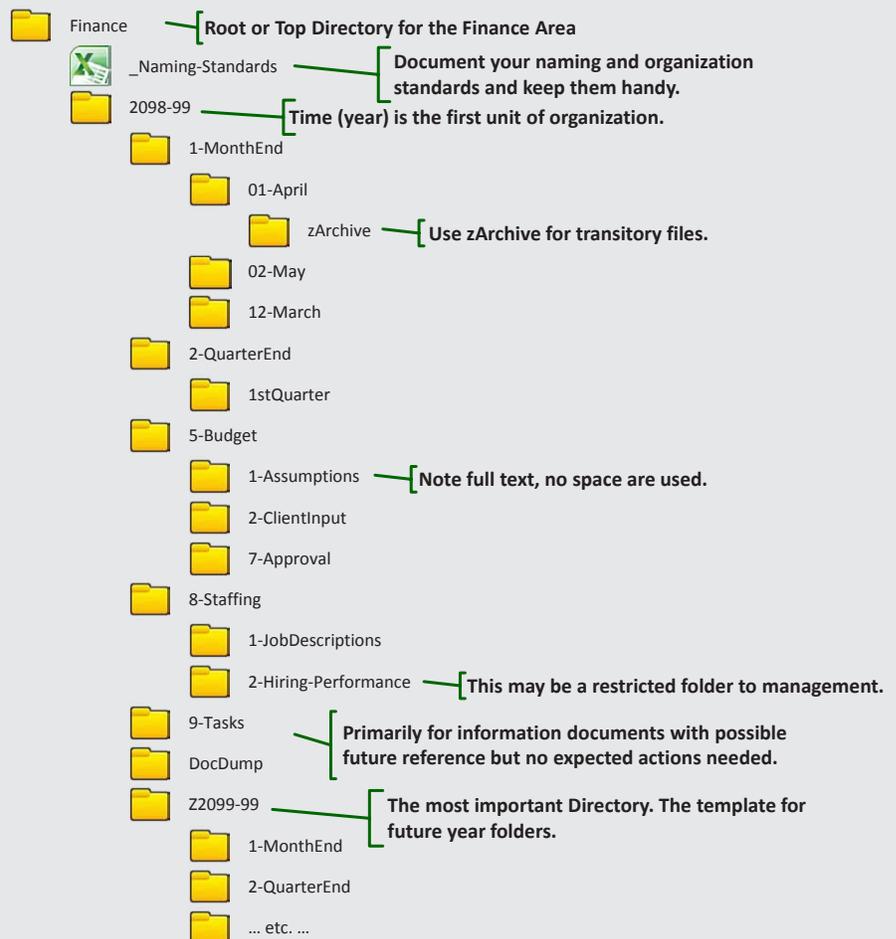


Figure 3: Side Bar: Network Drive Standards