

LIVE-OR-DIE TASK TRIAGE CHEAT SHEET

*From Chapter 7 of
Winning The Week: How To Plan A Successful Week, Every Week*



WHY TRIAGE?

There's the analogy: Your tasks are your patients, all begging for your skills and time to help them. And you're the doctor, deciding how to triage those tasks so that you can do the most good with your fixed resources. You know you can't get all these tasks done, as much as you might want to. You need a criteria similar to the triage system so that you can justify these tough choices to yourself and the people around you.

Here are your criteria:

- Your primary objective is to accomplish your number one leveraged priority because that creates the most value for everyone and makes your life easier over time.
- Secondly, you want to tackle your other essential tasks in a way that balances urgency with impactfulness.

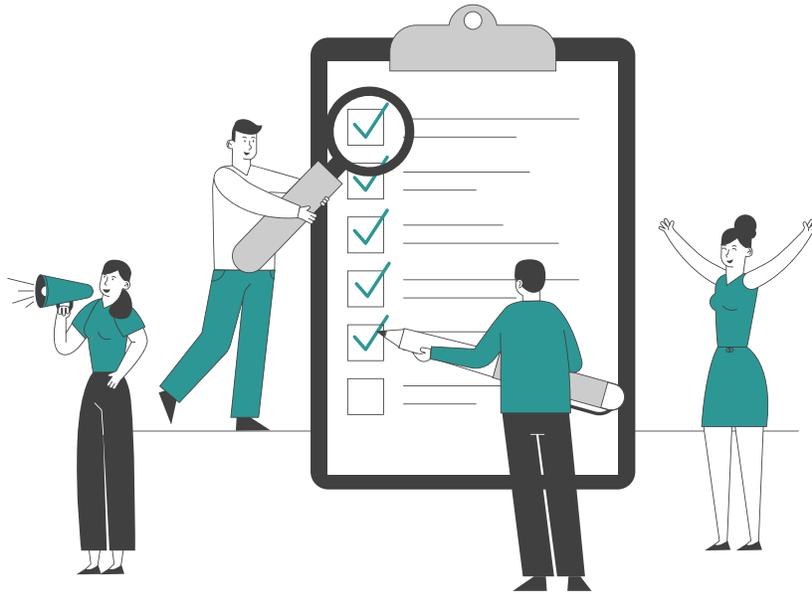
The first step is to make sure you have a full and complete to-do list. Break down your leveraged priority into its supporting sub-tasks and add them to your to-do list.

Next, scan your projects and ongoing responsibilities and think about the tasks you need to do to keep them moving forward.

And finally, write down any “brain flies” that have been annoying you — things that you've been meaning to do, but keep forgetting about. They all go on your list.

Now, it's time to triage your list.

Ruthlessly triaging your task list in five minutes using this decision tree will help you decide if a task should get done this week, has to wait, or dies altogether.



1. IS IT RELATED TO YOUR NUMBER ONE LEVERAGED WEEKLY PRIORITY?

✓ If yes, it should stay on your to-do list! Brainstorm all possible subtasks and dependencies, including tasks that other people have to do.

➔ If no, move on to the next question.

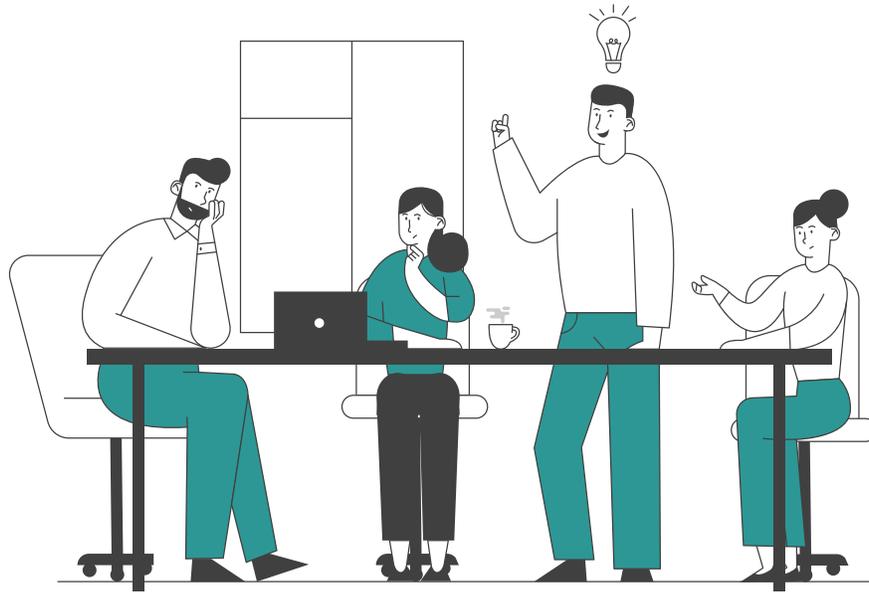
2. IS IT INCREDIBLY TIME-SENSITIVE?

You likely have tasks that **have to get done** or you risk getting fired or losing business. As long as you've already put your key priority first, you can also keep these urgent tasks on your list.

✓ If yes, keep it on your task list. Ask yourself **what could be sacrificed to make room** for this urgent but unimportant task.

➔ If no, move on to the next question.





3. CAN THIS TASK BE TACO'D?

Invariably, you'll find that you have more tasks than anyone could do, even if they worked around the clock. I have a fun acronym, TACO, that can help you cut down the size of your to-do list as you're processing it. It stands for Terminate, Automate, Consolidate, and Outsource. Here's how to use it:

Start by asking yourself “*does this task truly need to be done, or can it be Terminated?*”

You'd be shocked at how many tasks you'll find on your lists that are either already complete or that don't need to happen at all. Delete these tasks off your list. Now I get how absurd this can sound. My client Rahul laughed when I suggested that he could terminate tasks altogether. But after ten minutes of brainstorming, he suddenly came up with a great example:

“Well, I’ve been the PTA president at my kid’s school for four years in a row. Maybe it’s time to let someone else take the reins. I spend hundreds of hours a year in that role!”

Later that day, Rahul took thirty minutes to write a polite resignation email and freed up hundreds of hours in one fell swoop. That was an epic example of “terminate.”

Can this task be Automated? Can I make this task faster using technology?

Sometimes we overlook the fact that there could be a way to do all or part of a task using software instead of doing it yourself. There are so many new programs that make things easier to do these days. One of my favorites is Zapier, which helps two otherwise separate softwares speak to each other. In my case, it automatically creates a new row in a Google Sheet whenever someone books a meeting with me using my scheduling link. This way, my team can easily calculate the total appointments booked that month, by whom, and for what purpose.

So ask yourself: is there a technology you can use to automate all or part of a task?

Can this task be Consolidated? Could I achieve better efficiency by doing this task alongside similar work at the same time?

Consolidation means grouping similar tasks together on your calendar so that you can optimize your brain energy. The more task-switching you do, the less productive you are, so this strategy can really boost your productivity. If you see an opportunity for consolidation, go ahead and group those tasks together on your list.

Another example of consolidation is calls and meetings. If you're already spending most of your day in calls and meetings, it's efficient to go ahead and schedule more calls and meetings for that day. Let's be honest, you weren't going to get great work done on that day anyway, so why not pull more meetings into that day and get them done with?

Can this task be Outsourced? Could this task be delegated to someone else?

Ask yourself: what would need to happen to move this task to another person? Maybe you'd need to write a set of instructions or provide a decision tree to explain how to accomplish a task. Or (my favorite): film a video or a screencast showing someone exactly how you do it right, then send that to them as a set of instructions.

✓ If you can terminate, automate, consolidate, or outsource the task, then go ahead and do so now.

➔ If not, move on to the next question.



4. IS IT A SOMEDAY TASK?

If this task doesn't have a specific due date in the next month, it's likely a **Someday Task**. You know it's a Someday Task if it's **not related to your key priority**, yet there are no specific timelines or consequences to not doing it this week (other than you being disappointed). These tasks muddy up the water and make it harder to see the crucial tasks. **So get them off your list!**

✓ If it's a Someday Task, move it to your Someday List and off your to-do list. Review your Someday Tasks on a monthly basis to see if any of them deserve to make it back onto your main to-do list.

➔ If not, move on to the next question.

5. DO YOU NEED MORE INFORMATION ABOUT THE TASK TO MAKE IT ACTIONABLE?

If the task has made it this far without being classified, it might require **additional information**. There may be things that you need to clarify, or you may need to have someone explain its priority relative to other projects.

Let's say your boss has asked you to help sell an important new client. But, as you think about this task, you realize that you need more clarity to execute it. For example, what deliverables does your boss want to see? A pitch deck, a well-crafted email, or simply your attendance at a meeting? And by when—what is the timeline for this task? Also, would this task be done before or after other seemingly time-sensitive tasks? Without understanding this, it's hard to triage appropriately.

Remember, *it's ok to send it back and ask for more information!*

✓ If you realize you need more clarity, kick it back to the sender asking for more information.

