

Momentum

Playbook 35

**Make a Clean Sweep of
Your Tasks and Time**

By Maria Ross

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Playbook 16:

Make a Clean Sweep of Your Tasks and Time

The Joy of Tidying Up

Marie Kondo swept up our collective desire to simplify and clean in her [best seller](#), *The Life-Changing Magic of Tidying Up: The Japanese Art of Decluttering and Organizing*. I will admit I have yet to experience the thrill of this method, mostly because I'm too darn disorganized to make time to read the book. Also, I have to find someone to watch my curious three year-old or believe me, no purging will ever get done.

Her most provocative philosophy is this: *First, put your hands on everything you own, ask yourself if it sparks joy, and if it doesn't, thank it for its service and get rid of it.*

When it comes to decluttering our business tasks and times, unfortunately, this advice falls a bit short. Many of the things we have to do to keep the business running are not necessarily the most joyful: updating expenses, writing reports, trouble-shooting tech problems.

And while writing, networking and public speaking are joys for me, for many others they are the worst forms of torture possible.

As mentioned in a prior Playbook, we should be engaging in promotional and marketing activities that bring us joy. Otherwise, we won't do them and our audience will be able to tell we're phoning it in.

There are, however, many business tasks that suck up and our time and energy when they are unnecessary, ineffective or just plain a poor use of our valuable time. This week, we're going to audit our tasks and time and create our own "Keep" or Give Away" buckets to lighten our load.

Reduce Your Cognitive Load

There is a concept known as *cognitive load*, which you may be familiar with from cognitive psychology. It refers to the total amount of mental effort being used in the working memory, or short-term memory. Cognitive load theory was developed out of the study of problem solving by John Sweller in the late 1980s.

The point is that your brain only has so much short-term processing and memory power. Many studies have shown that anything non-essential that adds demands on this working memory will reduce effectiveness and learning.

Your goal is not just to purge or outsource all unnecessary or “non-joyful” tasks but to better manage the tasks that you still have to get done.

Make a Clean Sweep

Before you can organize, purge or outsource, we need to see what we’re dealing with. It’s time to clean out your proverbial closet and lay it all out there.

Document all your tasks and consciously track where you’re spending your time. We got a taste of this back in *Playbook 5: Make Space* but this time, let’s really focus on pulling everything out of the closet so we can decide what stays, goes or needs to be repaired.

Write down every financial, operational, marketing, sales and—oh yeah, actual client or creation work—you do on a weekly basis. What are the tasks, big and small? Using my business as an example, here’s a snippet of what I have to get done:

- Write blog posts
- Find images for blog posts
- Edit images for blog posts and add captions
- Create Twitter, Facebook and LinkedIn posts
- Draft my Entrepreneur.com article
- Draft my Huffington Post article
- Conduct book research
- Coach clients on my Brand Booster sessions
- Do work for any current SLICE clients
- Respond to email inquiries and leads
- Track social media metrics
- Send expenses to the bookkeeper
- Invoice clients
- Schedule meetings
- Pay bills and taxes

.....you get the idea.

Inventory all your tasks and get it all down on paper. Include those that only you can do and those that someone else could do for you—just dump it all out on paper. For example, no one else but me can coach my clients or prepare their brand strategy recommendations. We’ll get to how you organize this list in a minute.

Include the tasks you know you *should* be doing but for which you never make the time. And include every menial task such as buy office supplies or repair the printer, if need be.

There's a psychological benefit to documenting your tasks. It gets the worry and stress out of your head and onto something you can see and organize.

Now that you have your pages of tasks, activities and operations that need to be done in the course of your work, it's time to sort them into buckets.

Bucket #1: Get a Hold Of Yourself

What is easier or necessary for you to do yourself? This goes back to my point about no one else being able to coach my clients but me. Some of the work you do absolutely has to be done by you, but it's also *easier* if it's done by you. If you're a jewelry designer, you have to be the one to design the jewelry. If you're a photographer, people are hiring YOU to take their photos. If you teach a course, you have to be the one to do it. There's no way around this.

The goal with this bucket is to parse out the tasks you absolutely, positively must manage yourself so you can then see how to better manage your other tasks and make things easier.

Bucket #2: Smooth Sailing

Which systems, tasks or processes do you need to streamline?

After you take inventory of all your tasks, place those that could be made more efficient or automated into this bucket. This could include things like lead generation, addressing incoming inquiries, handling purchase transactions, shipping product, social media posting, etc.

Are you still tracking receipts and invoices in an Excel spreadsheet? Do you have scraps of paper all over your office with your To-Do's? Are you managing all your networking contacts and clients with a shoebox of business cards shoved in your desk drawer? These are processes you may want to think about streamlining!

We tend to think of all of our tasks and activities as equal in importance, effort and customization when they are really not. Putting the tasks that could possibly be automated or streamlined into one bucket helps you more clearly see this. When you identify the tasks that are either not bespoke for your clients or ones you can automate, you can better figure out how to put an efficient system in place.

According to sales and efficiency expert Leah Neaderthal of [GrowthWorks Solutions](#), there are five systems that every business owner needs to help streamline, regardless of how big the business:

- **Customer Relationship Management (CRM):** This isn't just for big companies, but it's of utmost importance for time/resource-strapped solopreneurs. You must have a system in place for managing leads, clients, partners, and email subscribers. It's fine to use Excel if it works for you, but you can also check out [Salesforce](#) (for small business), [Insightly](#) and [Zoho](#). And for managing your email list, you cannot just send out marketing emails from your own email address. It causes all kinds of problems. You ABSOLUTELY must use an app that adheres to all Privacy and CAN-SPAM laws and makes it super easy for you to email your list on a regular basis, such as [MailChimp](#), [Constant Contact](#), [Aweber](#) or [ConvertKit](#). Some solutions can do it all: CRM and email platform support.
- **To-Do List:** Manage your days and weeks. You can use tools like [Wunderlist](#), [Todoist](#) or [Trello](#).
- **Content/Email Filtering:** You want to reduce cognitive load by filtering the information you have to process each day. This involves unsubscribing from non-essential marketing/blog emails (*not mine, of course! LOL*) or at least ensuring you can read news when you decide, not when it's sent to you as an interruption. You can use tools like [Feedly](#) or some type of RSS Reader.
- **Productivity:** You need systems for email, documents, spreadsheets and collaboration. How else would you get work done?! Seems obvious but you'd be surprised. You can use [G Suite/Google Apps](#) as a great choice for email, documents, cloud storage and calendar. You can also use [Microsoft Office Suite 365](#), or the apps that come with your Mac but the collaboration abilities are not as robust as Google.
- **Document signing:** Reduce all barriers for new clients to sign on the dotted line. Don't make them print out your contract, sign it, take a scan and then email it back to you. Ugh. You can use easy digital document signing tools like [DocuSign](#) to make this happen.

Bucket #3: Let It Go!

What tasks can you, to paraphrase Princess Elsa from *Frozen*, let go and outsource?

Once you are clear about the tasks only you yourself can do (Bucket #1) and which tasks you can automate or streamline (Bucket #2), you'll be left with tasks that fall in neither bucket and can therefore be outsourced.

Many solopreneurs are control freaks or they want to "save the money."

I know this one can get tricky if you are on a budget, but hear me out: If you bill your time out for \$150 an hour, it costs you \$150 an hour in lost revenue when you decide to spend said hour on a task that doesn't really need your brain power. Where can YOU add the most value? If you can hire someone else at \$25, \$45, even \$75 dollars an hour, isn't it worth spending that hour on a paying client rather than on updating your website, setting up your email newsletter, scheduling meetings or resizing social media images? What small tasks add up to a big headache for you? What tasks only need your final blessing, not your involvement, to be successful?

Here's the key with outsourcing: You can't just throw a task over to someone and expect it to be completed successfully. This is a recipe for disaster and why most people say things like,

"I'm never hiring an intern again. I had to do everything again myself."

"That VA was horrible. The work was not up to my quality standards."

"Why did that contractor screw this up? I thought they could just figure it out on their own!"

While it's super easy to hire interns, or folks on [Fiverr](#) or [Upwork](#) to help you, you have to put some time into the relationship before you can properly "let it go."

Outsourcing Best Practices:

- **Get the right fit:** Ensure the person to whom you are outsourcing has the right skills and experience for the task you are requesting. This is where hiring a neighbor's nephew or a cheap resource can go horribly wrong so be mindful and check references.
- **Document the process in excruciating detail:** This avoids any miscommunication. When I started outsourcing my blog post and email formatting to my VA, I painstakingly documented each and every step of the process that I myself follow and included screenshots or references where needed. I even denoted font sizes, types and colors. I didn't assume *anything*!
- **Train them!** We like to think that we don't have to spend any time on getting an outsourcer up to speed. This is a huge mistake. Take the time to walk him or her through the process document by phone or Skype. If you are asking them to use a tool you're familiar with but that they are not, spend 30 minutes to train them. Spend the time upfront to get the results you want later.
- **Outline deadlines and communications:** Detail out all your deadlines and preferred communication methods. Do you want a weekly status update? Do you prefer texts if something goes wrong? Do you want an email when a task is done just so you can get it off your mind? Make sure you are crystal clear about how to communicate and what you expect.

Understand the real dollar value of your time and outsource tasks that don't add as much value to your bottom line.

Please revisit *Playbook 25: Dollars + Sense* if you have no idea what your time is actually worth!

Your Assignment: Tidy Up Your Tasks and Time

Sit down and brain dump all your business tasks, activities and operations:

Bucket #1: Only You

Which tasks can only be completed by you and you alone?

Bucket #2: Streamline

Which tasks could be automated or for which you can find an app to make things easier?

Bucket #3: Outsource

Which tasks make the most sense to outsource to a cheaper resource, given the valuable cost of your own time and how many tasks in Bucket #1 can only be completed by you?

But wait, you're not quite done....

Please post your epiphanies on how you're going to manage your tasks and time on the Facebook page by Friday.

Remember, we are here to encourage you and provide any feedback. If you're like me, often it's fellow collaborators that help me polish my ideas to a glossy sheen.

Again, I'm going to reward you all year long, so don't lose your MOMENTUM: Post it now and keep that train moving!

One Last Thing...

I get it. You're so busy. Believe me, with a dog, a toddler, a house to run, friends, errands, things that go wrong, my own energy level and, oh yeah, running my own business, I completely get it.

Schedule a day to step back and run through this Playbook. It's an investment to make things easier on you later on, I promise. Otherwise you will never get out of the exhaustion loop and you will never be able to give your best self to your work.

If you suffer from being a control freak, as I am prone to do, just remember that you are being smart and efficient by automating or outsourcing. In many cases, "done" really is better than "perfect." And if you follow some of the outsourcing best practices, you will be much more pleased with the results.

You can then devote your time and energy on being a control freak about the things that matter most: those tasks that only your own fabulous talent, brain and skill can do.

Think of it this way: If you're such a control freak, then isn't the Holy Grail to better control your own time, energy, efficiency and effort?

(mic drop....)

Tidy up,

Maria

Goodies and Inspiration

A [great summary](#) of Marie Kondo's most powerful decluttering tips.

Some specific folks I turn to for outsourcing are [Worldwide101](#) for my fabulous VA who does all my blog posting, image finding and newsletter setup, [Virtually Savvy](#) for social media management, and [Tiny Blue Orange](#) for website management. For interns, contact your local college or university to find business, marketing or communications students who are looking for internship opportunities.

And in case you lose your nerve or succumb to your inner control freak, [sing along with Frozen's Princess Elsa!](#)