

Admins' secrets for tracking assignments

A reader writes on our Admin Pro Forum: "We have tasks assigned to us via email, the phone, in-person, in passing, etc. I carry my notebook and keep it on my desk to jot down assignments and then transfer some tasks to Outlook, but I'm wondering if there is a better, more efficient way to keep track of everything. What are your secrets to staying organized and on top of all your assignments?"

- **Use Outlook to trap tasks and create a visual reminder**, says fellow admin Deb. "It is easy in the craziness of a typical workday to put something aside and have it get lost in the shuffle. This way, the project itself may be lost in my paperwork, but Outlook will remind me that it's there."
- **Ensure all tasks are captured in Outlook's Tasks section** by responding to people's requests for help by asking that they send it to you by e-mail, says admin Victoria. "Then I drag it to the Task folder," she says.

First, she categorizes the task—purchasing, personnel, facilities, etc. For each task, she adds a table with three columns, labeled "date," "description" and "attachment." Each time she communicates with someone about the task, she puts a summary of the discussion or a copy of the e-mail in the Task section.

Victoria also uses Tasks to track her time spent on each project.

- **Utilize start dates and priority rankings to sort tasks**, advises admin Katy. "I also color-code my tasks, depending on what they are about—fleet management, travel, admin, etc. I find that this helps me keep track of who asked for what," she says.

Review tasks at the end of each day, so you can prioritize to-dos for the next day. That way, when someone adds a new priority to your workload, you'll always know what can be moved around.

- **High-tech tracking isn't the only method, though.** Admin Lisa writes down to-dos in a notepad, along with the day's date. Before turning the page to add new tasks, she flags any unfinished tasks on the current page. Once she completes everything on a page, she adds a check mark in the margin at the bottom of the page. All notepads go in a box, each with a start and end date written on the front.