

Introducing the Task Matrix



The most important tasks can simply be flagged here, for example using a numeric value scale. Appropriate sorting can be done afterwards.

Periodicity of tasks is given here. If the “same task” is required in different periods, create a separate task for it and observe any potential differences to highlight.

A short, succinct description is important for focus. It may be necessary to divide tasks up if the description is too long.

Primary and secondary backups for critical tasks can be color-coded for their training level to perform these tasks.

Task Matrix Sheet									
Name: Hildegard						Upated 4/7/2020			
Most Important	Task No.	Task	Daily	Weekly	Monthly	Quarterly	Backup		
							Primary	Secondary	
	1	Prepare for annual client reviews	x				Kaye	Dee	
	2	Put together monthly e-newsletters	x				Kaye	Dee	
	3	Put together client binders		x			Dee	Kaye	
	4	New client Mind-Maps			x		Kaye	Dee	
	5	Maintain company website			x		Kaye	Dee	

Date: 7/23/2020

How To Apply The Tool

It is helpful to incorporate a Task Matrix into our everyday work because there can be so many different kinds of tasks to perform that a method for prioritizing is needed.

Stephen Covey divides tasks into 4 Quadrants. Some tasks are urgent and important while others may be urgent but not important. It is also possible for a task to be important but not urgent, or even a task that is neither important nor urgent but still needs to be done.

A Task Matrix helps to reach a shared understanding of what needs to get done, when, and who is responsible for each task.

What was the motivation behind creating the Task Matrix?

During my first DTL consulting gig, the Head of Accounting would keep saying the following:

- “I’m busy.”
- “I have so many things to do.”
- “It would take too long to create a list of everything I do.”

Finally, I asked Phyllis to come to the conference room, which had an electronic whiteboard. After listing 20-25 tasks, patterns emerged, groupings that helped Phyllis feel more in control. After seeing that there were five grouping, Phyllis placed all the tasks (approximately 90) within their associated categories. This information was put into Excel and the daily, weekly, monthly, and yearly columns were added.

Phyllis was given the Excel version and asked to determine what the time frame was for each task with a ‘High’ and ‘Low’ estimate for how much time (hours/minutes) it took to complete each task. To Phillis’ amazement, she found she would need to work between 65-80 hours per week to complete all of her tasks. When the owner, who was a long-time friend, saw the hours, he was embarrassed and said, “I did not know you were taking work home at night and working over the weekend.” Soon afterwards, a wall in the conference room began to fill up with photos of employees with their individual task matrices.

“The authors write that “knowing what’s expected is more than a job description. It’s a detailed understanding of how what one person is supposed to do fits in with what everyone else is supposed to do.” Every employee should be able to make a credible connection between their job and the mission and profits of the business.” – Book Summary: *12: The Elements of Great Managing* by Rodd Wagner and James Harter, JFD Performance Solutions