

How to Create SMART Tasks on TeamPage: OPL

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The purpose of this OPL is to create effective tasks on TeamPage and increase the percentage of tasks closed on time at each meeting.

Purpose

This OPL will assist you in developing more effective and accountable teams by creating SMART tasks.

The task is the smallest unit of action for the organisation. The ability to describe effective tasks increases people accountability, their capacity to close them on time and thus increases the organisation efficiency and its rate of improvement. In a standard meeting, the rate of on-time closure of tasks is a measure of leadership effectiveness and team maturity.

Method

Every time a task is created, the following must happen:

1. Create a brief title that is action driven
2. Add details in the body text if necessary
3. Nominate the person responsible to carry out the task who is part of the meeting
4. Decide on a due date – usually the next standard meeting date

| Key Points | |
|-------------------|--|
| Specific | <ol style="list-style-type: none"> 1. Use an action noun or a verb in the task statement. 2. Identify one assignee 3. Ensure the deliverable statement written in the task title is unambiguous |
| Measurable | Create an action which outcome can be clearly assessed. An action is either done or not done. Provide evidence |
| Achievable | Break down an activity into several specific tasks. The assignees can only commit if they are confident that they understand the task and are confident they will deliver |
| Relevant | Keep the meeting focused on its purpose and plan. Avoid spending time on defining tasks irrelevant for the subject at hand. If a topic is not in scope of the meeting yet important, log it in the parking lot and address it under "General" or after the meeting |
| Time Bound | A due date is a must. If the task is specific this shouldn't be a problem |

| Success Factors |
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| Measure the team's task closure rate. There are often uncontrolled obstacles and 80% is a good goal. |
| Task assignees need to inform people not part of the forum about tasks assigned to them e.g. Request John to do xyz... |
| Limit the time horizon for the due date |
| Assign the task to one responsible person. Several others can be part of the execution and are thus notified |
| Break down the work content to achievable bits |
| Provide evidence of delivery or progress by commenting the task and inserting relevant information or links (files, pictures, pdfs, related articles, etc.) |
| Take into consideration your workload and other commitments before committing to a task or a Due Date. |
| Review the tasks logged during the meeting at the end of it to ensure that assignees clearly understand their commitments. Are the tasks SMART? |
| See the closure of tasks on time as a key element of the team success |

| Do | Don't do |
|--|--|
| Task assignees that are members of the standard meeting | Task people that are not member of the standard meeting |
| Define the task: <ul style="list-style-type: none"> • Organise brainstorming session on 3 April • Provide feedback on... • Decide on... | And not: <ul style="list-style-type: none"> • Have a brainstorming session • Look into... • Discuss... |
| Set Due Dates for the next meeting or on a short time horizon: Short Interval Control | Set a Due Date in a distant fuzzy future or no Due Date |
| Short statement in the title section and bulleted description in the body text | Long wordy declaration in the title |
| Action title e.g Close Nonconformity #1234 | Cryptic title e.g. NC #1234 |
| Log multiple tasks that require small work content | Use a task to log an activity or mini-project |
| Show evidence of progress or closure | "In progress" or "started" are unhelpful words. It could just mean that the assignee started to work on the task 5 minutes before the meeting. |

Training

Training for the One Point Lesson is valid as long as the team is able to manage tasks effectively.

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| Date Trained: | | |
| Trainer Name | Co. # | Trainer Signature |
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| Trainee Name | Co. # | Trainee Signature |
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