## **CPA**

## Practice **Advisor**

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Gail Perry • Sep. 13, 2021



I'm a list person. I make lists for just about everything I do. Of course there are shopping lists, errands lists, personal to-do lists, lists of books I want to read, and so on. But the lists that are most front and center, and necessary, are my daily work checklists. I have found that when I start the day without a list of projects, the day quickly gets away from me and my productivity level is low.

There are a several steps to keep in mind when creating a checklist that can get you through the day. (I've put these steps into a list....)

• Create your daily checklists when you are relaxed and unrushed. If your mind is

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single project, or I can schedule multiple short projects in one chunk.

- When making your checklist, assign your projects into specific time chunks, so you know exactly what you will be working on at any particular time of the day.
- Allow extra time for your projects. If a project is likely to take 45 minutes, give it an hour on your list in case it takes longer than you expected or you have interruptions. If that 45 minute project takes only 45 minutes, you've got an extra 15 minutes to catch your breath, start another project early, or choose small items from your master list to fill in the time.
- Maintain a master to-do list of all the projects you need to complete. Most people have more work to do than they can accomplish in one day. Your daily checklist is the manageable list of the number of hours in the day you are committing to work. Your master to-do list is the overall list of all items you need to complete. You should refer to the master to-do list regularly to make sure those items are getting scheduled into your daily checklists.
- Keep a list of useful and/or productive things you do with small bits of extra time. If you finish a project early and have a few minutes to spare before you jump into the next project, go to your list (mine is called my Small Bites list) and use that time to take care a few little projects that aren't time-sensitive.
- Be flexible. If your day changes and you can't meet the expectations you set for
  yourself on your daily checklist, give yourself permission to move something onto
  a future checklist instead of beating yourself up about not getting everything done
  that you had planned.
- Leave open spaces on your checklists to allow for unexpected yet urgent projects. If you have an open time chunks coming up soon on your list, head over to your master to-do list and fill in the blank with a project that would have been placed on next week's checklists.

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