

# **Role of Technology in Improving Productivity at Work**

## **Effective Task & Calendar Management**

**- By CA Ashutosh Rathi**

# Meet Mr. Daga

CHARTERED ACCOUNTANT IN PRACTICE



Names presented in this presentation are fictitious.  
Any resemblance to actual persons is purely coincidental.

# Mr. Daga's Task Platter

Staying Updated/  
CPE Hours

Managing  
Spouse

Managing  
150 Clients

Social Commitments



Staff and Articles

WhatsApp Groups

Managing Emails

# Here comes Mr. TaskRaj



What are your Problems?

I have got no time left for growing my practice.

TaskRaj, I am not able to manage my tasks effectively, I need your guidance....



I am being controlled by Tasks that I have to do. It is just too overwhelming.

Too much of my time is spent in managing my team.

I am not able to fulfill my commitments and promises.



I shall provide that but knowledge alone is not enough. Promise me that you will implement it. Do you promise?



Supreme knowledge to manage my work and life with complete ease and grace

So, what do you want from me?



Yes, I promise!!!

Strategic Task Management

+

Simple Excel Tools

+

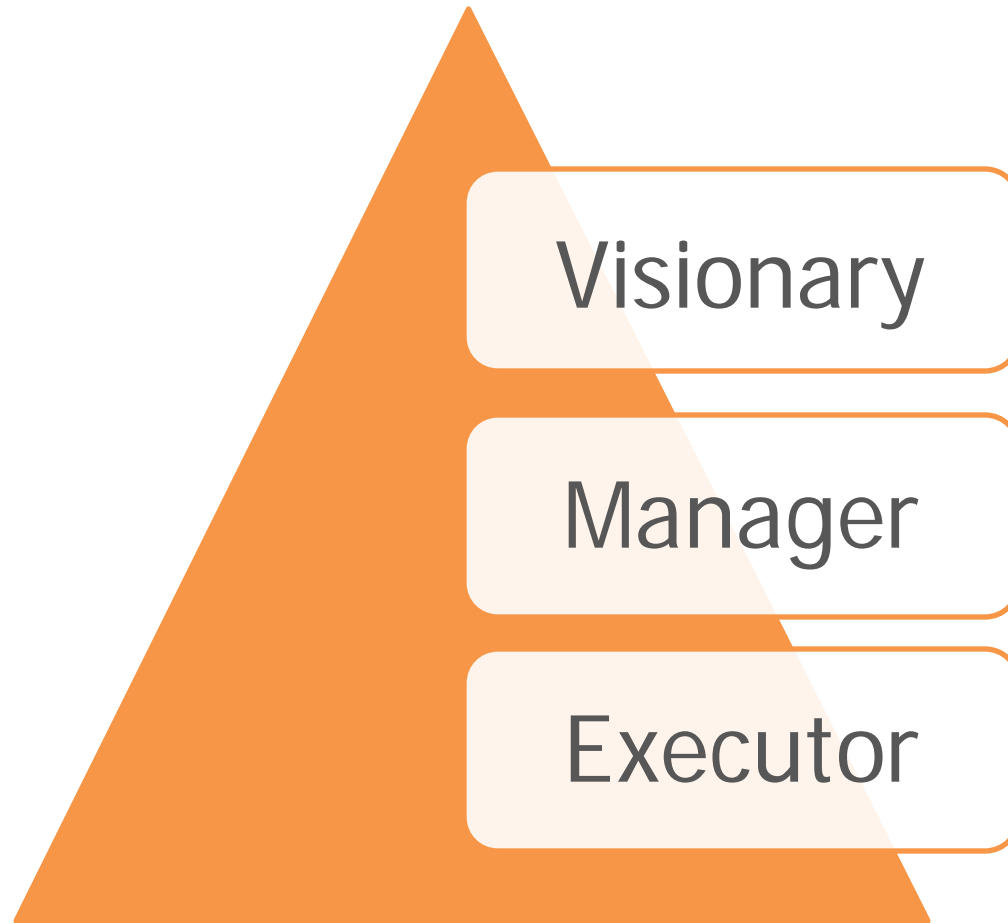
Technology

=

Grow and manage your practice with  
complete ease and grace



# Roles of a Chartered Accountant in Practice





# Declarations

One month  
Business plan



Outcomes to accomplish in  
one month



- ✓ Practice & Business Development
- ✓ Client Relationship Management
- ✓ Training & Development – Self & Team
- ✓ Execution of work
- ✓ System Development
- ✓ Financial Management

# Declarations

Outcomes to accomplish in one month (format)

Area	Outcomes
Area 1	Outcome 1
Area 1	Outcome 2
Area 2	Outcome 1
Area 3	Outcome 1
Area 4	Outcome 1
Area 4	Outcome 2



# Declarations

## Outcomes to accomplish in one month (sample)

Area	Outcomes
Business Development	Create 3 Lacs of additional work from existing clients
Business Development	Get empanelment at XYZ Ltd
Systems Development	Build tracker for VAT & Sales Tax
Training	Train staff for Ind-AS & ICDS - Income Tax Computation and Disclosure Standards
Financial Management	Bring outstanding debtors down by 80%
Execution	Allocate, manage and review the work of Service Tax, TDS & VAT Returns

# Planning

How are you going to achieve the outcome



Outcome	Tasks	Responsibility	Time
Outcome 1	Task 1		
	Task 2		
	Task 3		
Outcome 2	Task 1		
	Task 2		
	Task 3		

# Planning

Outcome	Tasks	Responsibility	Time
Create 3 Lacs of additional work from existing clients	Listing down top 10 clients of the firm	Staff 1	10 min
	List down the services for each client that we are not providing as on date but the client needs it for its smooth business	Staff 1	4 hours
	Set up meeting with all those 5 clients	Staff 2	1 hour
	Meeting those 5 clients and create opportunities for providing the additional services to them	Mr. Mehta	5 hour

Once you do this VISIONARY exercise diligently every month, your challenge No. 1 & 2 will vanish



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Mr. Daga, this is a monthly exercise of 3-5 hrs, do you promise to do this exercise?







**Great!**  
**Now, You shall lead from front**



## Effective Delegation



# Effective Delegation

Schedule 2-4 hours for planning your week

Plot the tasks from your monthly business plan document into the TaskHUB



What is a TaskHUB???

# Effective Delegation

TaskHub is a spreadsheet based simple task management tool that consists of following columns for every team member in the organization-

- Work allocation date
- Area
- Task
- Budgeted Time
- Timeline (deadlines)
- Status (Yet to do, WIP, For Review, Reviewed, Rework, Rework Pending, Completed)
- Work Completion Date
- Remarks



TaskHub\_XYZ ☆

File Edit View Insert Format Data Tools Add-ons Help All changes saved in Drive

Comments Share

fx Yet To Do

Work allocation date	Area	Work	Budgeted Hours	Timeline (Date)	Status	Work Completion Date
30-Mar-2016	Website	Website for the Firm	NA	7-Apr-2016	For Review	
30-Mar-2016	Audit Checklist	Make Audit checklist	6	31-Mar-2016	Reviewed	
30-Mar-2016	Mr. ABC	Application for correction in PAN Card	30 Mins	30-Mar-2016	Completed	30-Mar-2016
31-Mar-2016	DEF Pvt. Ltd.	Closing Books for the year ended 31st March 2016	3	31-Mar-2016	Completed	31-Mar-2016
01-Apr-2016	Ms. PQR	Prepare Income Tax Return	8	5-Apr-2016	Work In Progress	
03-Apr-2016	DSP Ltd.	Make Invoice for Rs. 70,000/- for Services Provided	15 Mins	4-Apr-2016	Completed	3-Apr-2016
4-Apr-2016	M/s XYZ	Prepare service tax return	1	5-Apr-2016	Yet To Do	
4-Apr-2016	Suresh Raina	Prepare service tax return	1	5-Apr-2016	Yet To Do	
					Work In Progress	
					For Review	
					Reviewed	
					Rework	
					Rework Pending	
					Completed	

+ Akshay Rathi Aarohi Doshi Deepali Panchal





# VAT Returns

## FY 2015-16 QUARTER IV

SR NO.	Name Of Client	19/03/2016						
		Send Requirements	Details Recd	Work By	Work Done on	Final Review	Return Filed	Bill Raised
1	Client 1							
2	Client 2							
3	Client 3							
4	Client 4							
5	Client 5							
6	Client 6							
7	Client 7							
8	Client 8							
9	Client 9							
10	Client 10							
11	Client 11							
12	Client 12							
13	Client 13							
14	Client 14							
15	Client 15							



# Implementing TaskHUB

- Use google spreadsheet only
- Plot task for only 50% - 60% of effective time, keep buffer for unplanned tasks and interruptions
- Be consistent in delegating work only through TaskHUB
- Create leader who manages entire TaskHUB
- Create discipline in organization to use TaskHUB religiously and the same should be updated in real time





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# Block Your Calendar

All the Tasks in your own TaskHUB should go in your calendar

April 10 - 16, 2016

Search Hemal (Ctrl+E)

10 Sunday	11 Monday	12 Tuesday	13 Wednesday	14 Thursday	15 Friday	16 Saturday
	Planning the week	Planning the day ↻	Planning the day ↻	Planning the day ↻	Planning the day ↻	Planning the day ↻
		Delegation	Delegation	Delegation	Delegation	
				Build Systems for Service Tax Management		Training the staff for Ind-AS
		Lunch	Lunch	Lunch	Lunch	
		Build Systems for VAT Management		Recovery of the dues		
		Meeting Mr. Khandar for creating more opportunities	Meeting Mr. Jaju for creating more opportunities			



So are you now clear how a visionary inside you needs to declare, plan and delegate tasks to the team?

Yes Sir.



Good question.

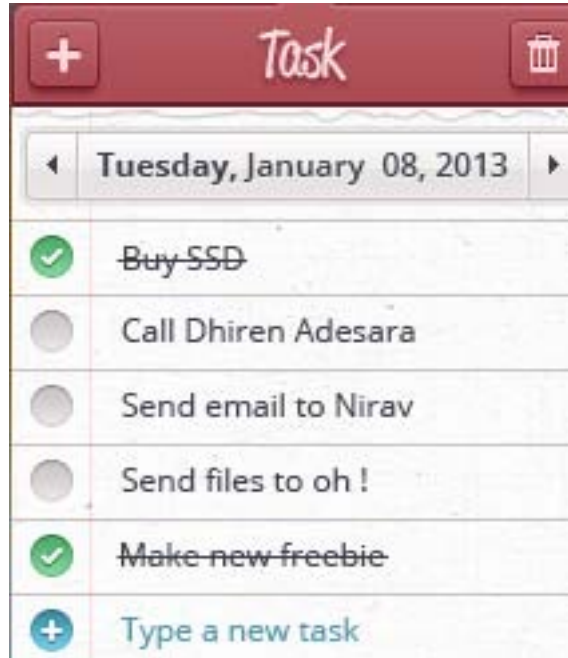
There are many ways to manage the unplanned tasks. But there are some basics you should keep in mind.



But, How do I manage unplanned tasks?"



# Step 1 - Have a simple CAPTURE tool



# Suggested Capture Tools



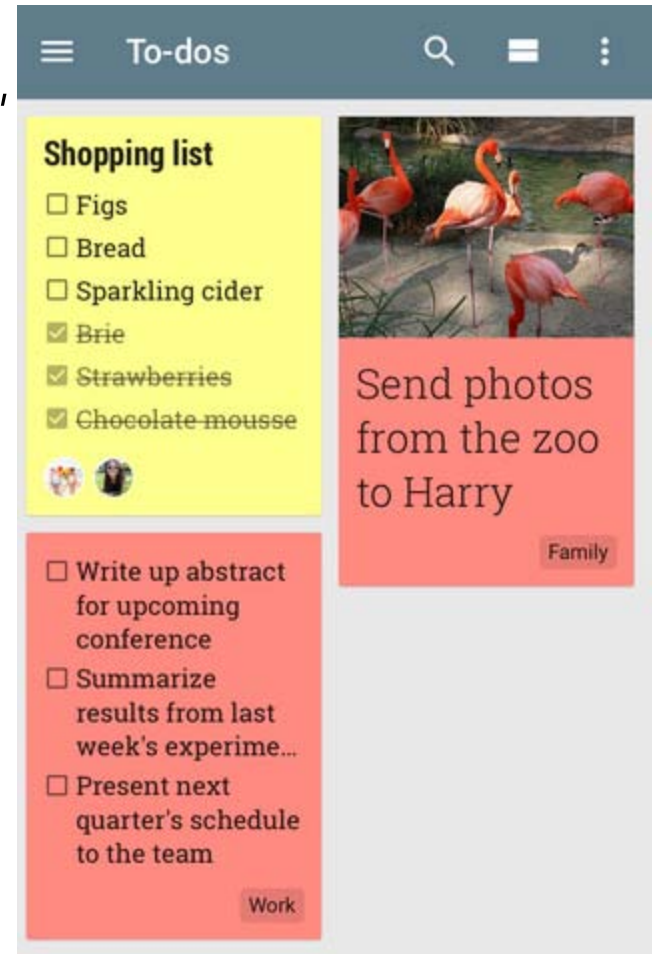
Google Keep



Tick Tick

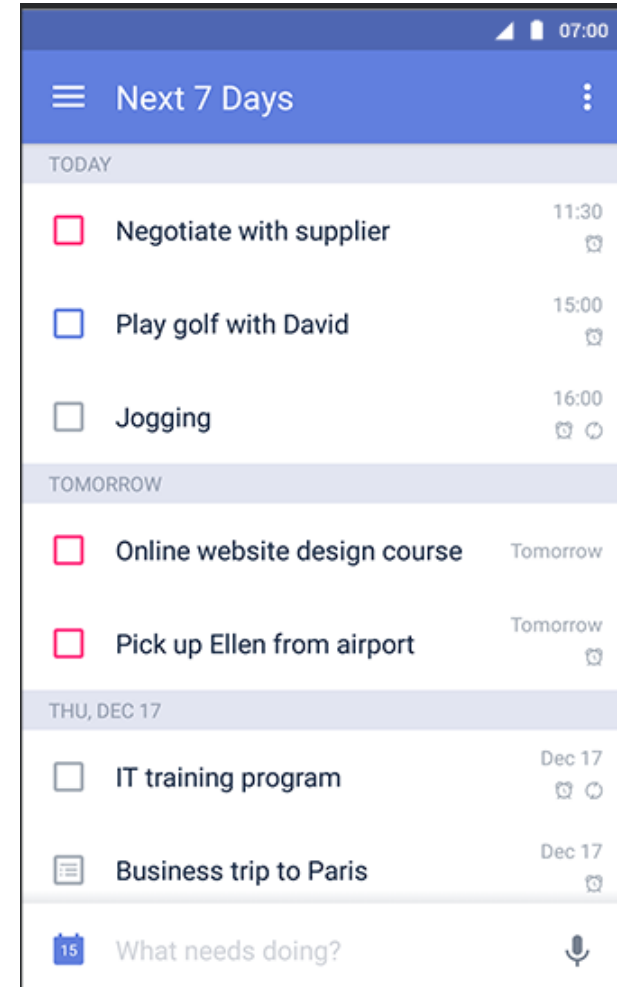
# Google Keep

- Cross-platform Sync (across android, iOS, chrome)
- Designed to capture type of notes
- Set reminders for every note
- Collaborative – Share your list
- Create notes, checklist, voice note, drawing, add image
- Transcribe text from the image
- Archive the notes
- Color coding
- Home screen widget



# Tick Tick

- Cross-platform Sync (across android, iOS, chrome)
- Designed specially for task management
- Organize tasks into lists (family, personal, business development, etc)
- Set reminders
- Home screen widget
- Collaborative – you can share the list





# Step 2 – Process on DAILY basis

- ✓ Empty your capture list on daily basis
- ✓ Apply 4D rule religiously while emptying your capture list
  - **Drop it** – Drop the task if its not worthy doing
  - **Delegate** – Delegate it if it can be delegated  
(write down in TaskHUB of your staff)
  - **Defer it** – Defer it depending on its urgency
  - **Do it** – Do it if it is really urgent



# Step 3 – Organize it



# Organize the tasks emptied from capture tool in powerful existence & keep reviewing it on daily basis

Date: 11/04/2016

Day: Monday

Organization of your Captured Tasks				
Today	Tomorrow	This week	This month	Next Month
Give reminder for VAT Returns	Make PAN Application for Mr. PQR	Write reply to ITO in the case of Mrs. XYZ for AY 2010-11	Replace AC of my cabin	
Make Invoice for Services provided to Mr. ABC		Write a testimonial for Mr. Panda		
Send documents to XYZ enterprise				
Take photo for passport application				



# Step 4 – Execute it



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Now, are you clear how do you go about managing unplanned tasks?

Start using Google Calendar or Microsoft Outlook Calendar



Yes, I am super clear about the way I am going to take care of unplanned tasks. But can you now please enlighten me on how should I efficiently manage my time?



# Google - Synchronized Widget

The screenshot shows the Google Calendar web interface. At the top, there's a navigation bar with links for Hiking, Gmail, Calendar, Documents, Photos, Sites, Web, and More. Below that is the Google logo and a search bar for the calendar. The main header shows the current date as October 20 - 24, 2011, with navigation arrows and buttons for 'Day' and 'Week' views. A 'CREATE' button is visible on the left. The main content is a calendar grid for the week of October 20-22, 2011. The grid shows events for Thursday (10/20), Friday (10/21), and Saturday (10/22). On the left side, there are sections for 'October 2011' with a calendar grid, 'My calendars' with color-coded categories (Fun Stuff, Dan and Elaine, Sporty Stuff, Tasks), and 'Other calendars' with 'Dan Work Stuff' and 'US Holidays'.

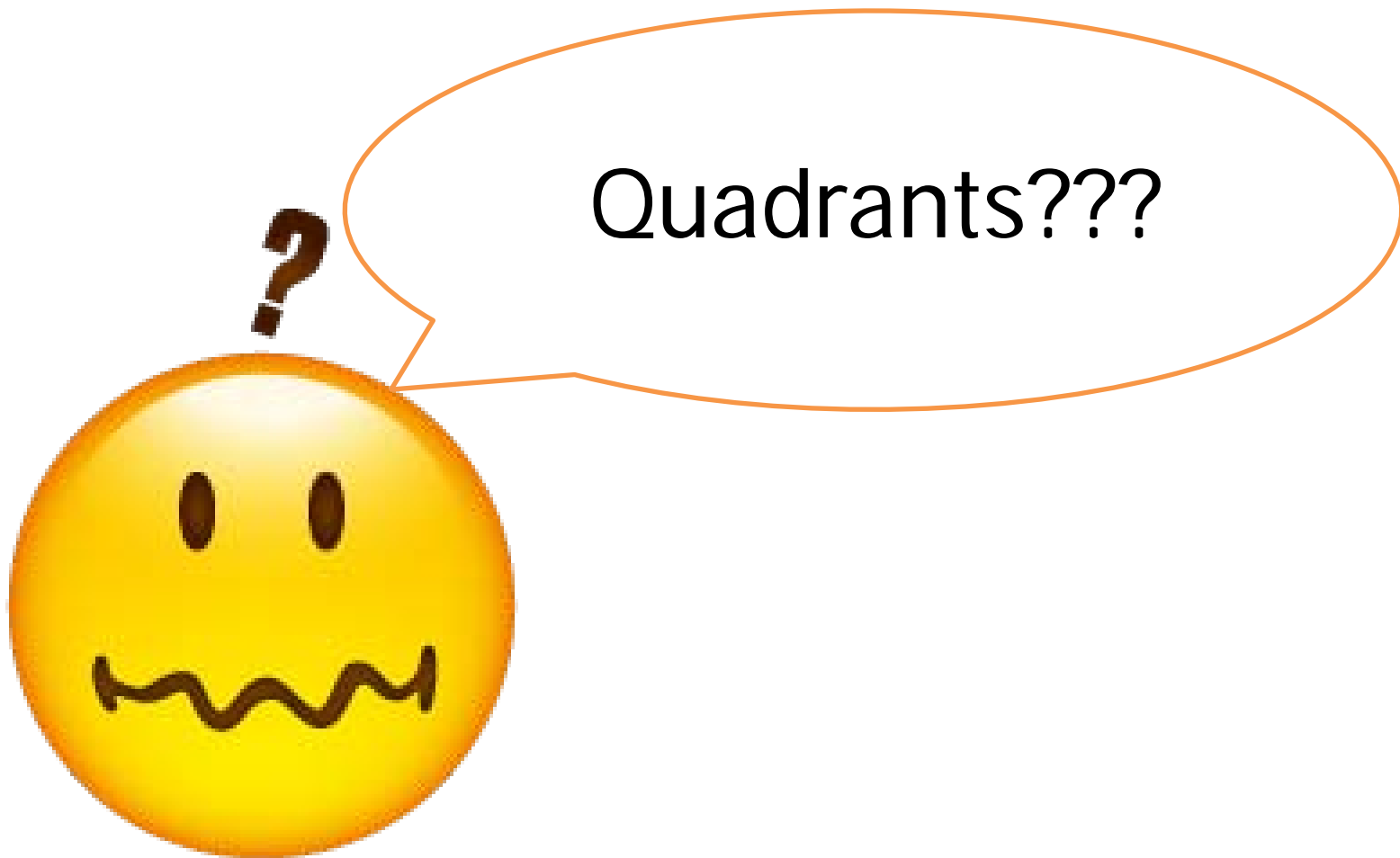
Time	Thu 10/20	Fri 10/21	Sat 10/22
10am	Call doctor Do the recycling	Mom's birthday	
11am		10 - 11 Hatha @ Yoga Corner	
12pm			11:30 - 1p Brunch at Michella's
1pm			
2pm			2p - 4:30p Bike around the lake w/ Jason
3pm	3p - 4p Meet tax lawyer		
4pm			
5pm			
6pm		6p - 7p Dance class w/ [unclear]	6:30p - 9p Movie night!
7pm			
8pm	7:30p - 8:00p Volleyball practice		
9pm	9p - 12 On-Call		
10pm			9:30p - 11:00p Drinks with Kara and Dana

The screenshot shows a mobile phone home screen with a Google widget. The widget displays the date 'FRI May 24' and a list of events for the week of May 27-28. The events are: 'Marathon training' (8am - 9am) on Monday, May 27; 'Ella's vet appointment' (9:30AM - 11am) on Monday, May 27; 'Lunch with Sam' (noon - 1pm) on Monday, May 27; 'Breakfast with Isaac' (9am - 10am) on Tuesday, May 28. The phone's status bar at the top shows '4G', signal strength, battery, and the time '4:20'. The dock at the bottom contains icons for Phone, Messages, App Drawer, Google+, and Calendar (showing '31').

# Prioritize your activities

- Accept that you shall never be able to complete all tasks in life
- Everyone has 24 hours. Successful people prioritize their time impeccably
- Focus on 1<sup>st</sup> & 2<sup>nd</sup> quadrants task





# Steven Covey – Time Management Matrix

	URGENT	NOT URGENT
IMPORTANT	<i>Quadrant I:</i> Urgent & Important	<i>Quadrant II:</i> Not Urgent & Important
NOT IMPORTANT	<i>Quadrant III:</i> Urgent & Not Important	<i>Quadrant IV:</i> Not Urgent & Not Important



# 1<sup>st</sup> Quadrant – Urgent & Important

- This is for the immediate and important deadlines. You have to do this immediately.
- Examples
  - ✓ Family emergencies
  - ✓ Compliance deadlines

Do it

# 2<sup>nd</sup> Quadrant – Important & Not Urgent

- Long-term strategizing and development
- Examples
  - ✓ Creating business plan
  - ✓ Planning the week
  - ✓ Business Development
  - ✓ Training & Development

Schedule & Do it

# 3<sup>rd</sup> Quadrant – Urgent & Not Important

- This is for time pressured distractions. They are not really important, but someone wants it now.
- Examples
  - ✓ Incoming phone calls that are off topic
  - ✓ Bill payments

Automate / Delegate it

# 4<sup>th</sup> Quadrant – Not Important & Not Urgent

- Yields little value
- Time passers & time wasters
- Examples
  - ✓ Mindless web browsing
  - ✓ Facebook browsing
  - ✓ Whatsapp Group Chat / Forwards
  - ✓ Gossip / unwanted discussions

Avoid it



# Implementing the matrix

	Urgent	Not Urgent
Important	Do	Monthly Business Plan
Not Important	Delegate	Drop

# Schedule time for things that take time!

- ✓ Preparation for meetings
- ✓ Travel time
- ✓ Sending action items (minutes, information request, thank you) after email
- ✓ Email – Twice a day
- ✓ WhatsApp – Once a day
- ✓ Use travel time wisely



So Mr. Daga, now are you clear about how will you manage your tasks?

Yes! Now I shall face no challenges in managing my tasks as well as managing my spouse



# Thank You

