ECO ACADEMY: CONSULTING 101

WORK SMART CHECKLIST

eco canada

When someone gives you a task, you may have an urge to jump right in. However, answering these questions before, during, and after completing the task will ensure that things get done efficiently and that you are learning from your experiences.

BEFORE STARTING THE TASK

WHAT

- *What is the task that I'm being asked to do?*
- *How will I know when the task is done?*

It is important to understand what you are being asked to produce. Also, you should seek to understand the specific parameters of the deliverable in terms of quality and requested characteristics. This might include, for instance, how tests results will be displayed, the types of charts that will represent them, and so on.

WHY

- *Do I know why I am doing this?*

If you don't know how the end product of your task is to be used, you will be working blind. Be sure that you know what people intend to do with your work, and then you can apply all your creativity and skills toward making certain that it is usable.

WHEN

- *How long do I have to complete my task?*

There are two dimensions of time to be considered:

- due date: the calendar date and time that the task must be complete
- budgeted time: the number of hours that can be dedicated to the task

WHO

- *Who needs to be updated on my progress?*
- *Who will receive my deliverable?*

Understand who will receive what you create and ensure that your understanding of the task aligns with their expectations. Determine when you should check in to inform on the status on your task (i.e., at completion? after an initial result?) or to get further clarification.

HOW

- *What strategy should I use to get it done?*

Consider the resources (people, documents, tools, etc.) that you have or need access to and how you will use them to achieve the results.

With a strategy in place, you can look for shortcuts that will get you there faster. You should also consider any factors that might prevent you from completing the task on time and find a way to work around them.

ECO ACADEMY: CONSULTING 101

WORK SMART CHECKLIST

eco canada

DURING A TASK

WHAT

- *Is the deliverable still clear?*

After digging into a task, further questions may come up. Also, opportunities to get different or better results may arise. You may want to check with the person you are reporting to and clarify expectations in light of what you have found.

WHEN

- *Am I on track to get done within the time constraints?*

You need to watch your time as you go. Will you be able to complete your task within the allotted time? If not, should you revisit your strategy? You should inform the person whom you report to. There may be some leeway, or they may be able to use interim results. Whatever you do, don't surprise them at the last minute!

WHO

- *Is there anything to report?*

As your task progresses, you may want to give updates along the way, especially if the task is complex or there are many uncertainties.

HOW

- *Is my strategy proving itself to be effective? Efficient?*

If things are not going the way you planned, you need to revisit the plan.

AFTER COMPLETING THE TASK

WHAT

- *Did I deliver what was requested of me, according to the specifications that I was given?*

Check again that you fulfilled the requirements for the deliverable. This can be everything from its contents to the way it was delivered (an email, a written or verbal report, a presentation).

WHEN

- *Did I deliver within the time constraints?*

You were either on time / on budget or you weren't. If you weren't, reflect on what caused you to go over and how you could control for these factors the next time.

WHO

- *How did the person I delivered to feel about my work?*

Ask people for feedback about your work. Just as a waiter asks "is everything to your liking?," an informal poll will give you a sense of how people feel about your work.

HOW

- *Was my strategy as effective and efficient as possible?*

Even if the deliverable was per specification, on time, and on budget, there may have been a better way to do it. Reflect on what you would do differently if you could start over. Ask yourself:

- What mistakes should I not make again?
- What tricks can I reuse next time?
- Have I recorded these reflections somewhere?