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Date:          March 6, 2016
To:            Jennifer Smith
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                  Kelly Smith Real Estate Team
                  Acme Realty
From:        Lauren Willar, Productivity Consultant
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Subject:     Recommendation memo for team workflow solution

## Purpose

This recommendation memo presents my findings on the study of Kelly Smith Real Estate Team's workflow (property-related tasks, priorities and communications), and recommends courses of action for effectively managing this workflow.

## Summary

In an effort to improve workflow issues, Jennifer Smith of the Everett, Washington office of Acme Realty asked me to study the Kelly Smith Real Estate Team's current workflow, determine the scope of the their issues, research solutions then present my findings and recommendations.

Currently, Jennifer Smith (herein referred to as "Ms. Smith") tracks the team's property pipeline with a basic spreadsheet and upcoming tasks are jotted down on a printed copy of this list during the team's weekly status meetings. After the meeting, a photocopy of the sheet is distributed to the team; however, each team member is individually responsible for prioritizing and completing his or her own work from that point. No further follow up on these tasks occurs. This system is not ideal because it:

- Is time consuming.
- Lacks accountability.
- Is inefficient.
- Does not encourage communication.
- Is prone to mistakes.
- Is not scalable.

Missed tasks and deadlines continually crop up and snowball into emergencies. Customers, whose homes and livelihoods are on the line, expect a knowledgeable competent team and team members feel these issues are getting in the way. In fact, Ms. Smith's role has slowly evolved from real estate sales to task enforcer and firefighter. A majority of her time is spent correcting mistakes and staying on top of others' priorities, not completing any tasks of her own. Therefore, Ms. Smith asked me to determine the best approach for improving the team's workflow and make it more efficient and effective.

To carry out this study, I completed the tasks described in my proposal from February 21, 2016: I acquired a basic understanding of the common reasons why workflow processes are ineffective; studied the team's current workflow and their attitude towards it; identified workflow and communication breakdowns; then researched possible solutions and prepared this recommendation report.

During the course of my research, I discovered team members manage their workflow quite differently. Unfortunately, their processes are disparate and hinder the flow of information among the team. No one member has a true grasp on all the moving parts until the team status meeting.

Team members felt extremely positive about the team and its purpose; however, sixty percent of them felt their workflow/communication only works some of the time. This attitude is indicative of poor planning, a lack of right tools and inadequate time management. My study ultimately found the primary causes of the team's issues are: (1) broken processes, (2) lack of prioritization, and a (3) failure to properly capture or clarify tasks and deadlines. Secondary causes are distractions, interruptions, and multi-tasking—all of which decrease focus and consume valuable time.

I recommend, first, two short-term courses of action: host a team "best practices" session to get everyone on the same page and establish expectations; and time/task management tip sheet that specifically addresses the challenges this team faces.

For continued success, I recommend two long-term courses of action: the adoption of a single task/project management software tool such as Zoho Project or Toodledo, which makes it simple to track, communicate, and collaborate on tasks; and a comprehensive time management and process flow study to identify all the bottlenecks, information and communication gaps and redundancies, and time "sucks".

# Introduction

To determine the best course of action for improving workflow efficiency within the Kelly Smith Real Estate Team, Jennifer Smith of the Everett, Washington office of Acme Realty asked me to study the team's current workflow, determine the scope of their issues, research solutions, and then present my findings and recommendations.

The team consists of two real estate agents and three support staff, which Jennifer Smith (herein referred to as "Ms. Smith") manages. Currently, the team runs their operation without any defined procedures. Team members are constantly on the go—some even work remotely—often resulting in the informal communication of tasks. No one team member tracks the progress of work, thus, significant confusion, mistakes and communication problems have resulted.

Currently, Ms. Smith uses a basic spreadsheet to track the team's property pipeline. A printed copy is used to record upcoming tasks during the team weekly status meetings. After the meeting, a photocopy of the sheet is distributed to each team member. From this point, no follow up actions on the "task list" occur, mainly, because each team member is responsible for prioritizing and managing his or her own work.

Missed tasks and deadlines continually crop up and snowball into emergencies. Customers, whose homes and livelihoods are on the line, expect a knowledgeable competent team and team members feel these issues are getting in the way. In fact, Ms. Smith's role has slowly evolved from real estate sales to task enforcer and firefighter. Unfortunately, she spends a majority of her time correcting mistakes and staying on top of others' priorities, not completing any tasks of her own. The current system is not ideal because it:

- Is time consuming.
- Lacks accountability.
- Is inefficient.
- Does not encourage communication.
- Is prone to mistakes.
- Is not scalable.

Therefore, Ms. Smith asked me to determine the best approach for improving the team's workflow and make it more efficient and effective. Specifically, we agreed that I would perform the following four tasks:

- Acquire a basic understanding of the common reasons why workflow processes are ineffective. I used secondary sources to perform this task.
- Study the team's current workflow and determine their attitude towards it. To complete this task, I developed an interview form and performed my own research and analysis.
- Identify the team's workflow and communication breakdowns. To complete this task, I used primary research and secondary sources of information.
- Research possible solutions. To complete this task, I used secondary sources to learn about "best practices" and evaluated software vendors (via their websites) based on a criteria that I developed.

During the course of my research, I discovered that workflow issues are common in today's workplace. Some come about as a result of ineffective leaders, however, most occur because of (1) inefficient

processes, (2) poor time management practices, and the (3) ever-increasing connectedness and instantaneousness of today's workplace.

In the case of the Kelly Smith Real Estate Team, each member manages his or her workflow quite differently. Some team members track their tasks in their head while others use Post-It Notes and paper. In fact, all team members use a combination of tools and techniques. Unfortunately, their processes are disparate and hinder the flow of information among team members. No one actually has a grasp on all the moving parts until the team's status meeting.

Team members felt extremely positive about the team and its vision and purpose; however, sixty percent felt their workflow and communication only works some of the time. This attitude is indicative of poor planning, a lack of the right tools and inadequate time management. My study ultimately found the primary causes of the team's issues are: (1) broken processes, (2) lack of prioritization, and a (3) failure to properly capture or clarify tasks and deadlines. Secondary causes are distractions, interruptions, and multi-tasking—all of which decrease focus and consume valuable time.

To immediately increase productivity, decrease frustration, and prevent mistakes, I recommend we conduct a team "best practices" session. This will ensure everyone is on the same page and establish workflow/time management expectations. Further, I recommend we develop a custom time/task management tip sheet that specifically addresses the challenges this team faces. Each team member would be able to post it at their desk, keeping the techniques and concepts fresh.

For continues success, I recommend two long-term courses of action. First, I recommend the adoption of a single task or project management software tool such as Zoho Project or Toodledo. These scalable, inexpensive tools make it easy to manage, communicate, and collaborate on tasks. Second, I recommend we conduct a comprehensive time management and process flow study. This would identify all the bottlenecks, information and communication gaps and redundancies, and time "sucks" that exist within the team and its workflow.

In the following sections, I provide additional details about my research methods, results, conclusions, and recommendations.

# Research Methods

I began my research with a 45-minute phone interview of Ms. Smith, who explained that the volume of work the team handles has grown exponentially over the last year. Unfortunately, the team has a lot of mistakes, missed deadlines, and miscommunications.

After providing a basic overview of the team's workflow, we broke the project down into four tasks:

1. Understand the common reasons why workflow processes are ineffective
2. Study the team's current workflow and their attitude towards it
3. Identify the team's workflow and communication breakdowns
4. Research possible solutions

### Task 1: Understand the common reasons why workflow processes are ineffective

After acquiring a basic understanding of the team's issues during my conversation with Ms. Smith, I conducted an Internet search and literature review to learn more about the potential causes. My research fell into the following categories:

- Time management mistakes
- Task management mistakes
- Common mistakes real estate agents make
- Communication breakdowns

As expected, there are many, many resources on these topics so I chose to focus on well-known publishing sources and authors.

### Task 2: Study the team's current workflow and their attitude towards it

Ms. Smith provided me with the names, pen colors (used to designate who a task belongs to), and a scan of the team's last status meeting printout. With this information, I developed an interview form containing mostly open-ended questions. The form had two objectives: (1) to establish how each team member currently managed their workflow and (2) to probe the team's feelings regarding the overall task management and communication among the team. It also helped guide me through each interview. On February 22, 2016, I attended Kelly Smith Real Estate Team's status meeting and interviewed each team member. Ms. Smith explained why I was there and I described the process we would be observing. During this meeting, I took notes and reviewed documents the team used. Afterward, I interviewed each team member (with the form I had prepared) and took notes. Figure 1, on the next page, shows a blank version of the form used during the interview process.

## Kelly Smith Real Estate Team
### Task Management Study

Team Member: [                    ]          Date: [                    ]

Which statement best describes the how the team communicates task assignment, status and completion:

_____ We're efficient task masters!

_____ We occasionally have issues.

_____ Sometimes we're effective; sometimes not.

_____ We are never on the same page.

Can you list at least one thing you think the team does really well?

In terms of task management & communication, can you list three things that are not going so well?

Briefly describe how you receive, track, manage and communicate the status of your tasks:

Observations:

**Figure 1. Team Member Interview Form**

### Task 3: Identify the team's workflow and communication breakdowns

I complied my notes from Task 2 and reviewed them for patterns. I returned to my research from Task 1 and used it to group "like" issues. For instance, I discovered an article detailing the top five time management mistakes that people make (Evans, 2015). Based on this article, I highlighted instances where a failure to prioritize tasks was likely a root cause (whether implicit or explicitly stated). I then recorded the total number of instances and compared it to the number of team members with the same issue. This analysis allowed me to create and rank a list of workflow and communication breakdowns.

### Task 4: Research possible solutions

I had a good idea of the root causes of the team's issues after Tasks 1-3. For Task 4, I referenced the same sources used during Task 1 and performed additional Internet searches on:

- Task management solutions
- Organizing your time
- Effective project management
- Project management solutions

As with Task 1, there are many, many resources on these topics so I focused on well-known publishing sources and authors.

I also used the data from Tasks 1-3 to develop an evaluation criterion for potential software tools, and then performed an Internet search to identify possible vendors. Once I had narrowed down the field to a couple of options, I created a comparison chart of these tools using the evaluation criteria I had developed.

## Assumptions and Gaps

Because there was a short timeline for this project, Ms. Smith and I chose to observe an informal interview, observation and research process. I did not conduct a rigorous study of the team and its workflow practices; as a result, several assumptions and gaps should be noted. Specifically, a lack of in-depth observation can result in certain errors during the process, such as:

- Items worth mentioning being forgotten (by team members)
- Lack of background (of the team and its processes by the interviewer)
- Biased opinions (by team members)

It is assumed that each team member accurately portrayed their workflow to me; however, all the issues identified within this recommendation memo are self-observed (i.e., verbalized by team members) and/or inferred/interpreted by me, therefore, there may be gaps in the workflow analysis. Because we are not studying the team in length, the impacts of individual time management decisions may not be accurately reflected or possibly remain unidentified.

Additionally, my analysis of the data from Task 2 resulted in multiple "causes" being recorded on some issues, essentially inflating the data slightly. However, it is important to identify *all* causes of each issue because the ultimate goal is to identify and address the team's workflow issues which are often complex and have multiple real world causes.

# Results

In this recommendation report, I present the results of my research. For each task carried out, I only present the most important data.

## Task 1: Understand the common reasons why workflow processes are ineffective

The results of my research from the secondary sources have been synthesized below.

The constant flow of information coming at professionals today means we are more likely to be overwhelmed and overstimulated. In particular, real estate professionals are more likely to "never say no" and tend not to take the time to "recharge their batteries" (Burgess, 2015).

Poor communication and ineffective time management directly affect task management success. A team's failure to communicate can result in:
- inefficiencies
- misunderstandings
- missed opportunities/lost sales
- costly mistakes
- decreased creditability, reputation and trust
- damaged relationships

The most common reasons for miscommunications are confusing language; unclear or unidentified expectations; and inappropriate frequency, length and/or timing of messages (Simon, 2015).

When it comes to task management, people often fail to capture and organize their tasks efficiently. According to one Fast Company article, people fail to stay on top of their tasks due to:
- prioritization issues
- underestimation of task completion time
- failure to manage distractions
- multi-tasking that prevents focus and leads to wasted time

## Task 2: Study the team's current workflow and their attitude towards it

On February 22, 2016, I went to Kelly Smith Real Estate Team's office. I attended a team status meeting then interviewed each team member regarding his or her individual workflow processes and thoughts.

**Attitude**

The results from the question *"Which statement best describes the how the team communicates task assignment, status, and completion?"* are in Table 1 below.

| Team Attitude | | |
|---|---|---|
| We're efficient task-masters! | 0 | 0% |
| We occasionally have issues. | 1 | 20% |
| Sometimes we're effective; sometimes not. | 3 | 60% |
| We are never on the same page. | 1 | 20% |
| TOTAL RESPONSES | 5 | 100% |

**Table 1. Attitude Response Data**

One hundred percent of the team answered this question. Sixty percent of the team felt their workflow and communication is efficient only some of the time. Not one team member felt the team is the most efficient they can be.

The responses provided by the team when asked to list at least one thing going well are in Table 2 below.

| *"Going Well"* Responses |
|---|
| We get along great |
| We are all comfortable and  communicate on an informal level |
| Everyone is capable of doing the tasks of everyone else (w/in legal bounds) |
| Feel supported |
| Make an impact on our client's lives |
| Good at picking up where others leave off |
| We all have the same vision and goal |
| We all love this line of work |
| TOTAL RESPONSES    8 |

**Table 2.** *"What is going well?"* **Response Data**

The responses provided by the team when asked when asked to list three things that are not going well (in terms of task management and communication) are in Table 3 below.

| *"Not Going Well"* Responses |
|---|
| Some people take too long to respond |
| Lack focus and clarity |
| Too many ways to communication & do things |
| Deadlines are vague or not  communicated |
| There's an assumption that everyone is on the same page |
| We don't have a way for everyone to easily check on the status |
| Some team members move too fast or don't pay attention |
| There's not enough planning |
| We're overwhelmed with things to do |
| We are constantly interrupted |
| A lot of time is wasted fixing mistakes |
| People don't communicate that they need help |
| Drowning in emails |
| Constantly interrupted |
| Not tracking all the moving parts |
| TOTAL RESPONSES    15 |

**Table 3.** *"What is not going well?"* **Response Data**

**Tools and Methods**

Table 4 lists the tools and methods the team currently uses for assigning, tracking, managing and communicating their tasks.
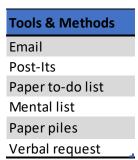
| Tools & Methods |
|---|
| Email |
| Post-Its |
| Paper to-do list |
| Mental list |
| Paper piles |
| Verbal request |

**Table 4. Tools & Methods Used for Managing Workflow**

The chart in Figure 2 documents each team member's task tracking method.

| | Email | Post-Its | Paper List | Paper | Mental List | Total Used |
|---|---|---|---|---|---|---|
| Member 1 | X | X | X | X | | 4 |
| Member 2 | X | | | | X | 2 |
| Member 3 | | X | | | X | 2 |
| Member 4 | | X | X | X | | 3 |
| Member 5 | X | | | X | | 2 |
| Tool Total | 3 | 3 | 2 | 3 | 2 | |

**Figure 2. Individual Task Tracking Process Chart**

As you can see, Team Member 1 uses his/her email inbox, Post-It Notes, paper lists, *and* piles of paper/files to manage his/her workflow. On average, each team member uses 2.6 tools to manage their tasks. Overall, there was an even split among the use of the tools.

**Technological Constraints**

The team's technological skill levels varied from basic to moderate. Everyone can use a PC and Internet Explorer. Most of the team has very basic skills in Microsoft Word, Excel, and Outlook. All of the team members knows how to operate an iPhone and copy/paste data.

**Financial Constraints**

Ms. Doe also expressed a desire to keep solution costs below $1,000 (including labor) and minimize the need for on-going updates or analysis by a professional.

*Task 3: Identify the team's workflow and communication breakdowns*

Based on research from Task 1, I developed the following list of workflow and communication breakdown root causes:

1. Inefficient processes
2. Prioritization issues

3. Underestimation of task completion time
4. Distractions
5. Multi-tasking
6. Failure to capture a task
7. Failure to clarify a task or deadline

I then highlighted the workflow and communication issues in my notes (from February 22, 2016) and attributed them to these causes (whether implicitly or explicitly stated by the team). Next, I determined the prevalence of each issue using this tally, as listed in Table 5 below.

| Observations | Team Total | Avg. | # of Team Affected | % |
|---|---|---|---|---|
| Inefficient process | 11 | 2.2 | 5 | 100% |
| Prioritization issue | 10 | 2 | 5 | 100% |
| Failure to capture task | 9 | 1.8 | 5 | 100% |
| Underestimation of task | 9 | 1.8 | 4 | 80% |
| Failure to clarify task or deadline | 8 | 1.6 | 3 | 60% |
| Distraction | 7 | 1.4 | 4 | 80% |
| Multi-tasking | 6 | 1.2 | 5 | 100% |

**Table 5. Workflow Issue Root Causes**

The columns in this table represent:
- *Team Total* is the total number of instances that I identified during my analysis.
- *Avg.* is the average number of instances per team member (total number of instances divided by 5 people).
- *# of Team Effected* is the total number of team members that share this issue.
- *%* is the percentage of the team effected by this issue (total number affected divided by the team total of 5).

I then sorted this list using the total number of instances (*Team Total*) and the percentage of the team affected (*%*).

## Task 4: Research possible solutions
Additional research relating to communication improvement, time management and the software tools available is synthesized below.

**Communication Tip & Tricks**
*Stop & Think* is a communication technique were you (the "sender") stop prior to communicating and ask yourself (Simon, 2015):
- *What is my goal?*
- *Who is my audience?*
- *What is the best way to convey this message to my audience?*

The answer to these questions help you reflect on your purpose and select the best communication tool available.

Written communicators need to be mindful of their speed (slow down and proofread!) and layout their expectations clearly. The goal is to be short and simple. You should always be clear, concise, up front and use simple language. (Simon, 2015)

**Time Management Tips & Tricks**
David Allen of *GTD* offers five steps to de-clutter your tasks:
1. Capture 100% of the things on your plate, no matter how big or small.
2. Clarify the tasks need to complete each "thing". *Is it actionable? Can you defer it? Can you delegate? Can you do it quickly?*
3. Organize your tasks. Categorize them, and then add the tasks to the appropriate list.
4. Review your lists often; clean up and update your lists regularly.
5. Engage: Plan for a time to do your tasks, and actually do them.

Other timesaving tips and tricks:
- Always plan and prioritize
- Limit distractions
- Record yourself when you are unable to add a task to your list
- Learn to say "no"
- Batch like-minded tasks (i.e. phone calls, emails, errands)
- Schedule time to complete large tasks (or groups of tasks)

**Software Tools**
As expected, an Internet search for project and task management tools revealed many software solutions of varying cost and complexity. Because the Kelly Smith Real Estate Team is small and has basic workflow needs with varying levels of technological expertise, I chose to research popular low cost Web tools.

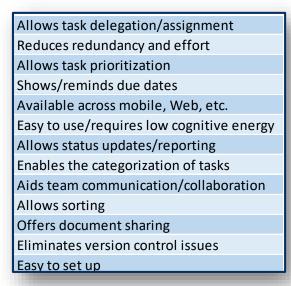Using the research and findings from Tasks 1-4, I developed the criteria shown in Figure 3.

Allows task delegation/assignment
Reduces redundancy and effort
Allows task prioritization
Shows/reminds due dates
Available across mobile, Web, etc.
Easy to use/requires low cognitive energy
Allows status updates/reporting
Enables the categorization of tasks
Aids team communication/collaboration
Allows sorting
Offers document sharing
Eliminates version control issues
Easy to set up

**Figure 3. Software Tool Criteria**

Using this criterion, I quickly narrowed down the options and created the evaluation chart shown in Figure 4. To be thorough, I also included Outlook, which is already available and used by the team.

| Criteria | Toodledo | Outlook | Podio | Zoho Project | BaseCamp |
|---|---|---|---|---|---|
| Allows task delegation/assignment | Silver | w/Exchg | Yes | Yes | Yes |
| Reduces redundancy and effort | Yes | Yes | Plus | Yes | Yes |
| Allows task prioritization | Yes | No* | No | Yes | No |
| Shows/reminds due dates | Yes | Yes | Yes | Yes | Yes |
| Available across mobile, Web, etc. | Yes | w/Exchg | Yes | Web/iPhone | Yes |
| Easy to use/requires low cognitive energy | Yes | No | No | No | Yes |
| Allows status updates/reporting | Yes | Yes | No*** | Yes | Yes |
| Enables the categorization of tasks | Yes | Yes | Yes | No**** | No**** |
| Aids team communication/collaboration | Silver | No | Yes | Yes | Yes |
| Allows sorting | Yes | Yes | Yes | Yes | No |
| Offers document sharing | Gold | Yes** | 3rd Party | Yes | Yes |
| Eliminates version control issues | - | No | - | Premium | 3rd Party |
| Easy to set up | Yes | No | No | No | Yes |
| Annual Cost Per User | $ 14.99 | None | $134.40 | $ 249.00 | $ 348.00 |
| Users | 5 | 5 | 5 | Unlimited | Unlimited |
| **Total Annual Cost** | **$ 74.95** | **None** | **$672.00** | **$ 249.00** | **$ 348.00** |

**Figure 4. Software Tool Evaluation Chart**

# Conclusions

Based on my findings, I present the following conclusions about the Kelly Smith Real Estate Team's workflow.

## *Attitude*

The team does a fantastic job of managing its interpersonal relationships. The team clearly shares a passion and enjoys working together. Team members are competent, knowledgeable and appreciate the team's informal structure. And, although I did not speak to them directly, the volume of the team's active clientele certainly suggests the team has a positive impact on the community as well.

Unfortunately, the team is not impervious to the workflow issues commonly experienced by other busy professionals. Sixty percent of the team feels their workflow and communication processes only go smoothly some of the time, and not one person considered the team to be taskmasters.

When specifically asked about task management and communication matters that are not going well, there was an underlying frustration. As a result of inefficient processes and poor planning, many team members are now feeling overworked and stressed—which makes it hard to focus and leads to mistakes, poor decisions, and decreased productivity. Overall, the team felt there was a lot of room for improvement.

## *Current Workflow*

Currently, there are no defined workflow procedures. Each team member manages their workflow very differently—from mental lists to email inboxes. On average, each team member uses 2.6 tools, and not one person uses the same process as anyone else. One team member relies on email, Post-Its, paper lists, *and* piles of files to manage their tasks.

As is common in the real estate industry, team members are constantly on-the-go so tasks are often communicated informally—via verbal requests made in passing, phone calls, notes, texts and emails; unfortunately, this has created a "team of individuals" and hindered collaboration and communication. The result is a lot of miscommunications, mistakes, and missed deadlines.

## *Breakdowns*

The biggest issue affecting the team is its lack of task planning and prioritization, both as a team and individually. Each team member has issues with capturing, prioritizing, and communicating the status of their tasks. The major culprit of these issues is the disparate processes used to manage workflow—from email, Post-Its, and paper lists to mental lists.

Piles of paper and email inboxes are not effective techniques for tracking tasks. The actionable task is not captured, and emails/files often get buried under the most recent fire. They also do not allow you to establish reminders or priorities. Post-It notes and paper "to-do" lists are more effective than piles and inboxes because you can prioritize your list(s), but these techniques are just susceptible to the issues mentioned above. And, mental to-do lists tend to be ineffective because our minds prioritize and recall things based on need; tasks are easily forgotten without triggers (like a physical list). Combining techniques can resolve some of these shortcomings, however, the process often becomes cumbersome to manage and ultimately enhances inefficiencies—making planning and prioritizing even more difficult.

I noticed the team is also struggling with the clarification and/or underestimation of tasks and deadlines. You cannot plan your day or prioritize tasks when you are missing facts, and planning is key to effectively managing workflow. Fast approaching (or previously missed) deadlines have a snowball effect and throw the entire team's schedule out of whack. Moreover, inaccurately estimating how long it will take to complete a task has the same effect as—and often leads to—missed deadlines.

Finally, the team is struggling to manage the desire to be "all things to all people at all times". Interruptions and distractions eat up valuable time and force team members to multi-task, but they are hesitant to say "no" and potentially disappoint someone. Without balance, however, focus suffers and the amount of work increases, amplifying the team's stress and workflow challenges.

## Possible Solutions

The goal in workflow management is to optimize the flow of information. To do this, you must have access to the right tools and understand "good" time management practices. There is "productive time" and there is "wasted time". Wasted time is time not spent working on your job-related tasks, whereas, productive time is time spent working towards a goal. While wasted time can never truly be eliminated, it can be minimized to increase productive time. A number of ways to accomplish this are:

1. Use time and project management techniques.
2. Eliminate unnecessary workflow steps.
3. Replace inefficiencies processes with better ones.
4. Minimize distractions and interruptions by letting people know you are unavailable.
5. Limit multi-tasking because it takes away from your focus.

The key is to find a combination of tools (both online and offline) and techniques that work for the team, not against it, then ensure everyone knows how to use them.

# Recommendations

Based on my findings and conclusions, I have the following recommendations.

## Short-Term

To immediately increase productivity, decrease frustration, and prevent mistakes, I recommend we hold a "best practices" seminar. During this session, I will teach the team tips, tricks, and techniques around time management, task management and project management. This ensures everyone is on the same page and has the same productivity expectations.

Each team member would also benefit from a time/task management tip card. Members can post the tip card at their desk to keep the techniques they learn fresh in their minds. While there are many tip sheets already available, I strongly recommend we develop a custom tip card that specifically addresses the challenges the team faces.

If these short-term solutions are not possible to implement, at a minimum, I recommend the team read *Getting Things Done: The Art of Stress-Free Productivity* by David Allen. While not as effective as a custom productivity session, time management experts regard this book as the manual of time management and productivity.

## Long-Term

For continued success, I recommend you adopt a task/project management software tool for the team. My recommendation is Zoho Project (www.zoho.com/projects) because it offers a comprehensive set of features within an easy-to-use interface. It is also relatively inexpensive ($250 annually for unlimited users). It does requires some set up and has a small user learning curve; however, it is scalable and customizable. You will be able to track your entire property pipeline—documents, tasks, expenses, even task/project updates—and there is an internal messaging app for collaboration and communication.

If task management is the only desired feature, then I recommend Toodledo (www.toodledo.com). It is an online to-do list tool that can be accessed from anywhere (via the Web or the app). It is very inexpensive ($75 annually) and offers all the features required for successful time management. It is also less cumbersome to use collaboratively than Outlook.

Finally, I would strongly encourage a comprehensive time management and process flow study. Within this recommendation memo, I have identified the most prevalent challenges the team faces and offered simple solutions, however, I believe the team would benefit from a more in-depth analysis. I would be able to identify specific (1) bottlenecks, (2) information and communication gaps and redundancies, and (3) time "sucks" that affect each person and process in the team's workflow. The result of this analysis is a standardized set of workflows (forms, checklists, and processes) that maximizes the flow of information and improves the team's efficiency, communication, and collaboration.

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