Chapter 3
Checklists, Daily To-do Lists, and Magnetic Scheduling Boards
Introduction

- Simple methods for scheduling
  - Can be used quite effectively
  - Often not covered when discussing scheduling methods
- Helps organize
Selecting a Scheduling System

- Purpose of the schedule
  - Force detailed thinking and planning for the project
  - Effectively communicate the plan to everyone involved
- The scheduling method depends on the size and complexity of the project
  - The contract may dictate the type of schedule and the reporting requirements
- The schedule is made for the person receiving it, not the person preparing it
  - Tailor the method for the party receiving it
Checklists

- Probably the most basic type of schedule
- May be used with other methods of scheduling
  - May be all that is needed for some projects
- Consist of a list of steps needed to accomplish a desired outcome
  - Helps make sure nothing is forgotten
  - Keep track of materials and equipment that may be needed
- Although simple, are still important and effective
  - Not having the correct equipment for a task
Automated Excel Checklists

- Use Excel checklists to keep track of multiple projects
  - Incorporate dates
  - Check off items as they are completed
  - Can have subsequent dates calculated automatically
  - Uses the WORKDAY function in Excel
    - See the sample on the book disk
    - May generate a sophisticated schedule, but not as rigorous as other methods
Daily Lists and Planners

- Prioritized list of tasks that need to be accomplished each day
  - Can be done at the end of each day or first thing in the morning
- List the activities for the particular day, prioritize them
  - Use a system of letters and numbers
    - A items are most important
    - 1 is the first item to be completed
  - The most important items get completed first
  - Not every item should be an “A1” item
Electronic Planners

- Electronic version of the to-do list
- Palm Pilot or other PDA
  - Schedule meetings
  - Keep track of contact info
  - Memos
  - Calculators
- Avoids cumbersome paperwork
- Backed up on a computer
Magnetic Scheduling Boards

- Metal-backed calendar with activity names and dates
- Shows which projects the crews are working on for a particular date
- All crew members must have access to the schedule location
- Any changes may cause all subsequent activities to necessitate a manual change
Conclusion

- The basic methods of scheduling can be used effectively, especially with other methods
  - Daily lists
- Keep the schedule as simple as possible but maintain the key purpose
  - Force detailed thinking and planning
  - Communicate that thinking and planning to everyone involved in the project