

'Tasks and Steps' (T&S)

An **easy-to-use** tool for the standardization of clerical work, project management and team collaboration

Frequent annoyances at the office

Does the below sound familiar?

- Communication is done primarily via email:
 - A lot of **time is wasted** searching for and looking through old emails
 - **Not** everybody is always in CC and **up to date** – in other times, they are in CC too much and receive information **irrelevant** to them
- The current progress of the project is not easily accessible, neither are the most urgent things to do. This becomes a source of **stress** for managers and employees.
- No defined process or manual for clerical tasks, so that:
 - Depending on who does the job **results differ** in quality and time needed
 - Detailed **knowledge** about the process stays with experts and is **unavailable** to the rest of the team in their absence.
 - It is hard to keep track of **mistakes** to avoid/potential to improve when the project or a similar process is repeated.

T&S offers an easy solution to above issues.

What is T&S?

- 'Tasks and Steps' (T&S) is a software that is
 - Very **easy to use**, does not require a high level of IT skills
 - Created for office work in **small/medium size businesses**
- People love it because it:
 - **Focuses communication** on the most relevant tasks
 - **Visualizes progress** and problems, thereby reducing stress
 - Creates manuals for office work leading to a **growing knowledgebase** the entire team benefits from
 - **Prevents repeating mistakes**

Much office work is a to-do-list of **T**asks (left) – and any Task consists of many small **S**teps (right)

The screenshot shows a web application interface for 'Monthly Accounting'. On the left, a sidebar lists tasks under three categories: 'I.) Preparations', 'II.) Finalization of documents', and 'III.) Follow-up'. The main area displays a detailed view of a task, 'Printout online banking statements', which is broken down into four steps. Each step includes a description, a due date, a user assignment, and a comment field. Callouts provide the following information:

- Work has been written down and organized in Tasks. A clear structure is visible now.** (Points to the task list and the task title)
- Steps explain in detail what needs to be done in order to complete the Task.** (Points to the step descriptions)
- Each Step is assigned to a user. It is clear who is in charge/responsible** (Points to the user field for Step 4)
- You can leave comments/notes here.** (Points to the comment field for Step 3)

The interface also includes a search bar, navigation links (List, View, User, About), and a user profile (RD interlogue) in the top left. The top right shows system status (Logged in, Logout) and various icons. The bottom right has a set of navigation icons (minus, exclamation mark, plus).

What T&S can be used for

- Standardize processes and ensure **quality control**
 - The structure of work is visualized making it easy to understand
 - By going through a to-do list, you no longer need to worry about forgetting important tasks which reduces stress
 - The team can achieve equal results independent on who does the work
- Information and progress is shared and visualized enabling **transparency**
- T&S is a cloud based tool always accessible from any PC or mobile device*

*We also offer intranet installations. Please contact us for details.

Visualization of work contents, progress and problems

In form of to-do and check lists

The screenshot shows a web application interface for 'Monthly Accounting'. On the left, a sidebar lists tasks under three categories: 'I.) Preparations', 'II.) Finalization of documents', and 'III.) Follow-up'. Each task has a status icon: a blue checkmark for completed, a red exclamation mark for problems, or a red equals sign for pending. The main area displays a task 'Finalization of documents' with three steps. Step 1 is completed, Step 2 is pending, and Step 3 is pending with a red exclamation mark. A callout bubble points to Step 3, stating 'Problems: A due date is near, but this Step has not been completed yet. The warning sign appears at the Task on the left side as well and can be spotted on first sight.' Another callout bubble points to the top of the task area, stating 'Quality control: All Steps inside these Tasks have been completed. Only then the Task can receive the checkmark icon as well.' A third callout bubble points to the 'Send to tax attorney' task in the sidebar, stating 'Progress: Inside these Tasks there are still uncompleted Steps.'

Quality control:
All Steps inside these Tasks have been completed. Only then the Task can receive the checkmark icon as well.

Problems:
A due date is near, but this Step has not been completed yet. The warning sign appears at the Task on the left side as well and can be spotted on first sight.

Progress:
Inside these Tasks there are still uncompleted Steps.

What to do with T&S concretely

- **Communicate**

- Team members can exchange information directly at the to-do item, always on-topic.
- This replaces email and removes the need to search for relevant information in your mailbox.

- **Manage**

- Assign work to members, responsibility is always clarified
- Set due dates
- Supervise progress, quickly find problems and see where assistance is needed

- **Document**

- Add results and issues as a comment directly at the to-do item
- These comments become valuable hints the next time the work is repeated

Communicate, manage, document

The screenshot displays the 'Monthly Accounting' interface. On the left, a sidebar lists three main sections: 'I.) Preparations' (with three sub-tasks and blue checkmarks), 'II.) Finalization of documents' (with three sub-tasks, the last one 'Send to tax attorney' is highlighted with a red box and a red exclamation mark), and 'III.) Follow-up' (with two sub-tasks and red exclamation marks). The main area shows a task 'Finalization of documents' with a sub-task 'Send to tax attorney'. It lists three steps, each with a 'DUE DATE' and a 'User' assigned. Step 1 is assigned to 'Chris', Step 2 to 'Chris', and Step 3 to 'Herrmann Runge'. A comment thread is visible for Step 2, with a red warning icon next to the first comment. A blue popup notification is present in the top right corner.

A popup notifies us that another user has added a comment

List: Monthly Accounting
Ryan commented on
Step 1: Printout online receipts

A team member had an issue last time and added a warning. This time, it can be avoided.

Steps can be assigned to users here

Commenting on Steps, members can communicate on-topic, similar to social networking platforms.



Transparency for oneself

Agile board for self organization

Steps from any List can be marked as 'favorite'. They all appear here in the backlog

From the backlog you prioritize the Steps for your work day, simply by drag & drop

Following the progress of your work, the Steps move from left to right until they are completed

Agile Board for My Favorite Steps

BACKLOG

- TEST / NEW GROUP / TASK 1
Apply for social media marketing seminar
Mike: Seminar no 10 on July 20th out of company curriculum
- TEST / NEW GROUP / TASK 1
Final check invoices May
Mike: Last time problems with currency exchange rate. Double-check current rates.
- TEST / NEW GROUP / TASK 1
Decide on new office coffee maker
Mike: Personal preference: Cafe au lait and double espresso almond flavored macha...
- TEST / NEW GROUP / TASK 1
Summer festival: Confirm status of preparations
Mike: Ask secretary
- TEST / NEW GROUP / TASK 1
PRIVATE: Book yoga classes for next month
- TEST / NEW GROUP / TASK 1
Cancel newsletter subscription
Mike: Tokyo Bay Digital Newsletter
- TEST / NEW GROUP / TASK 1
Sales meeting presentation, follow-up
Mike: Add latest figures

SELECTED

- TEST / NEW GROUP / TASK 1
Order flower bouquet for dept. leader birthday
Mike: Have all department members sign birthday card
- TEST / NEW GROUP / TASK 1
Quarterly report to headquarters
Mike: Explain background of Asia-Pacific market development
- TEST / NEW GROUP / TASK 1
Prepare documents for tax adviser
- TEST / NEW GROUP / TASK 1
Call client X, make appointment

IN PROGRESS

- TEST / NEW GROUP / TASK 1
Review of cybersecurity settings and processes
Mike: Waiting for feedback from IT

DONE

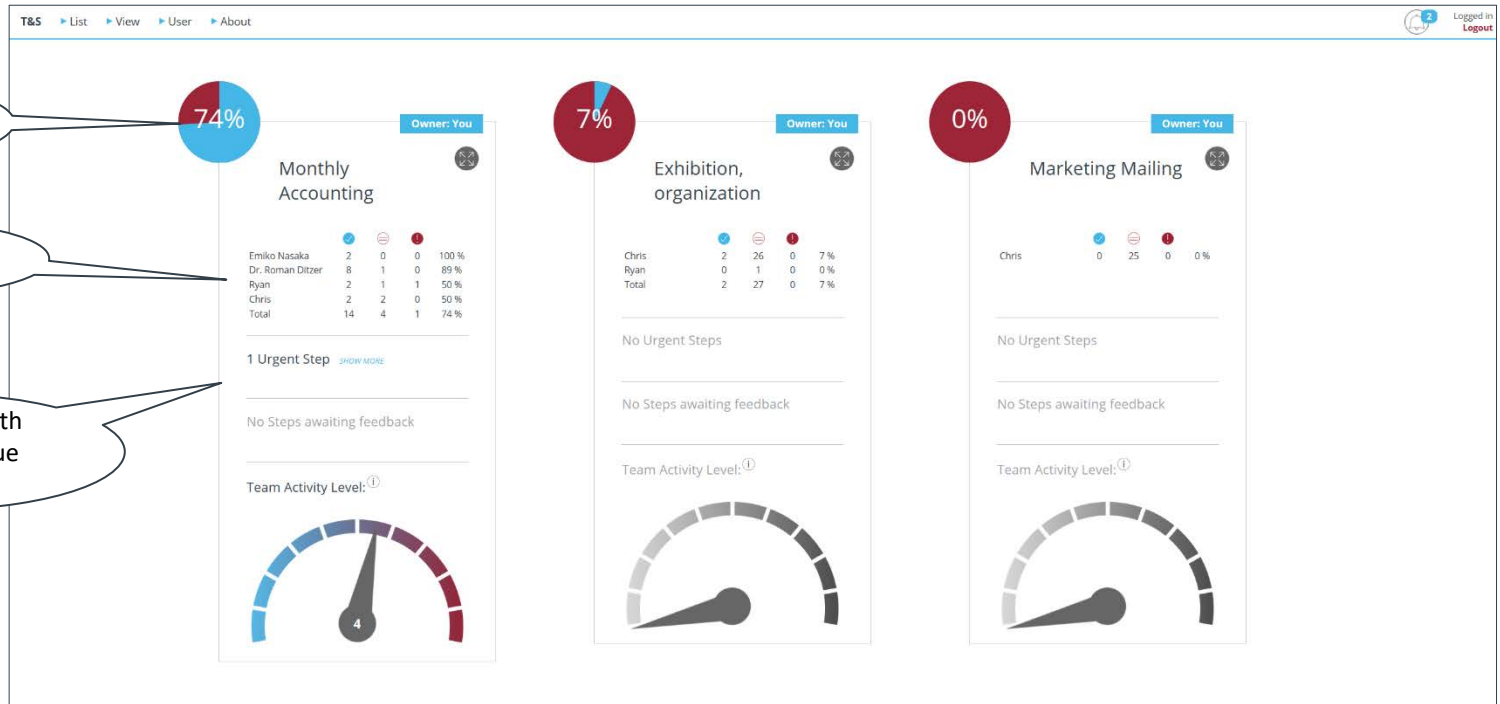
- TEST / NEW GROUP / TASK 1
Get back to vendor (mobile phone contracts)
Mike: Change contract to monthly payments
- TEST / NEW GROUP / TASK 1
PRIVATE: Make appointment at dentist

Your work day at a glance
All your todos (Steps) from multiple projects (Lists) in one place

Never lose sight of your progress
Clear horizontal visualization of status

Transparency for managers

Automatically generated executive summaries in 'tiles'



Progress

Progress by user

See all Steps with approaching due dates

Examples of use cases

What our clients use T&S for

- Example: Preparation of yearly accounting
- Example: Onboarding of new employees
- Example: Answering a request for quotation, creation of an offer
 - manuals for repeating processes
- Example: Organizing of events / exhibitions
 - manuals for repeating projects
- Example: Production preparation process
 - tool for project management
- Example: Standardization of processes in Lean administration / Office KAIZEN
 - tool for continuous improvement (CIP)

Our clients have experienced many improvements using T&S.

Don't you have similar use cases in your office?

Effects of using T&S



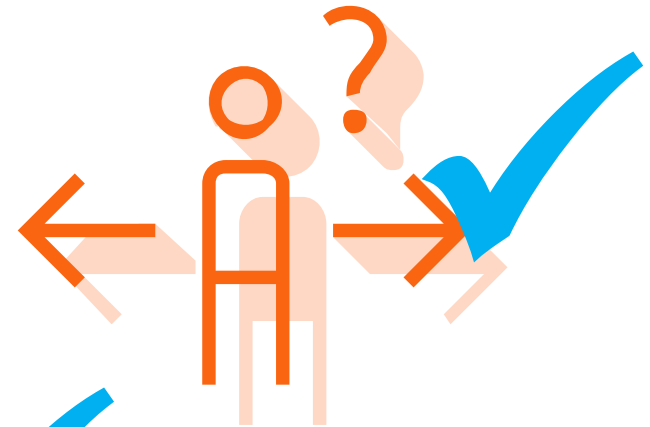
Through standardization:
Quality stabilizes



No more looking
through emails



Reduced stress:
Managers and
employees can relax



Project progress and
status are easy to see



Process easily adjustable
enabling improvements

We offer workshops

Would you like to get help getting started?

Prior to the workshop we set up your T&S-system (complimentary*)

- In advance of the workshop
 - Choosing of routine processes / repeating projects with potential T&S effects
 - Choosing of staff members, project leaders to be involved
- During our workshops, we:
 - Help structuring your work in T&S. We will create your first to-do 'Lists' together.
 - Introduce your team to the basic functions
 - Provide you with useful hints and recommendations based on our experience
- After the workshop
 - **Checking** the KAIZEN-effects by before-after-comparison
 - **Transfer** to other viable processes, creating of further 'Lists' by yourselves
 - **Further improvement of the** 'Lists' during practical use
 - With further 'Lists' : **accumulation of the process knowhow** of your company

* Usage and support free of costs for three months, with costs after the testing period

If you like T&S just go ahead and contact us for further information

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