



# Managing Time

## Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Understand the importance of, and the most useful techniques for, setting and achieving goals.
- ✓ Identify how to develop plans for doing things wisely.

# Managing Time

## Prioritising your Time

### The Power of a Change

#### Your Bucket List

It takes time to make time work for you. If you are truly going to make any difference in your life because of today, you have to be prepared to make some changes.

There is an expression from somewhere that says no one ever lay on their deathbed and said, "I should have spent more time at work." At the end of their lives, people mostly think about people they love, particularly their family. We even tell our children to treasure their relationships with family, because it's not usually the boss who comes to hold your hand when you are lying on your deathbed.

To get us started in thinking about time management and peak performance in the best way possible, let's put life into perspective.

#### My Bucket List

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## Changing Our Perspective

### Making Changes

It would be hard to find a person who hasn't read a book or taken a workshop on time management, or at the very least thought about time management. Everyone is interested in learning to use their time more wisely.

However, traditional time management wisdom only works well for some people. We've assembled ideas here that aren't just encouraged by time management teachers. We've tested them ourselves and bring the very best to you! We've scoured the research to consider the range of personality types, and also looked to techniques that have been researched and applied to people from all walks of life. Because, let's face it, we're all different, so we need different tools to collect and consider before figuring out which ones will work the best in our own situation.

Our days seem full to bursting with meetings, e-mail, voice-mail, projects, and task lists as long as your arm. Is it any wonder when we get to the end of a week and say, "Wow, where did that week go? I can't believe it's gone already!"

The truth is, we can all probably rearrange some things and do things differently. The result will be that we increase our personal efficiency, and enjoy life too.

Of all the high priorities that we consider, we generally find the following four are the most neglected. See if you can relate to any of these. Neglecting any or all of them can be at a high cost.

### Connecting with People

We're most likely to stay in touch with people that are on auto-pilot with us, so that we don't have to plan anything. Friends who belong to the same clubs, sports, and school activities are people we will see more often, just based on following our usual routines. Friends that we lost touch with, though, can offer us a lot.

### Paperwork

Take a mental look around your house and office. Are there stacks of paper everywhere? Are you meeting deadlines? Are you paying all your bills on time? Can you locate tax slips, auto insurance, or put your hands on your passport when it's time? What kind of filing system are you using? In the same respect, can you find the files you need on your computer, and have you backed up your information?

## Summary

These activities are all possible if you make an appointment and protect the time for yourself. If a colleague asks for a favor that you'd rather not do, or a friend wants you to help them move, you're more likely to say "no" if the time is reserved for other things and noted in your planner.

## The Dot Exercise

Read any self-improvement book and you will learn that hard work, focused goals, and persistence are important (very important!) in getting to where you want to go in life. Goals or targets are also an important part of managing your time.

Before you can develop plans, you have to know what you want to accomplish (your goals or targets); how you want to accomplish those goals or targets; what resources of time, money, and materials you have; and who will carry out the implementation. So set some targets for yourself, targets that you can see, and we'll start the journey to reaching them.

Many of us are full of ideas but short on taking constructive action to put those ideas into play. Maybe we try something once and then meet failure because we didn't think and plan the actions through. But you know what they say about the lottery: "You can't win if you don't buy a ticket." Well, the same is true in life: if you stop trying, you lose all chance of succeeding. Make a covenant with yourself that you will make an effort to put into practice the things we talk about today that will be of the most benefit to YOU. And to make that covenant even more of a commitment, share it with a colleague, your spouse, or your supervisor.

Today we are going to spend a bit of time talking about why you should set goals for yourself, and the best way to do it so that you have a good chance of reaching your goals.

## Setting Goals with SPIRIT

Goals and objectives are the basis for planning. As the Cheshire Cat said to Alice, "If you don't know where you are going, then any road will take you there." And that is often how we approach life. We just live, and if we end up where we want to be, hey, that's great. If we end up where we don't want to be, hey, that's life.

We can do a bit better than that, if we really want to. The first element in planning is knowing what we want to achieve, and the way we word our goals is the biggest factor in helping us achieve them. Goals should reflect your SPIRIT!

### Specific

Be specific about what you want or don't want to achieve. The result should be tangible and measurable. "Look gorgeous" is pretty ambiguous; "Lose 20 pounds" is specific.

## Prizes

Reward yourself at different points in the goal, particularly if it's long-term. If your goal is to set up a home office, for example, you might purchase a new desk when the room is cleared out and ready.

## Individual

The goal must be something that you want to do. If your spouse wants you to lose 20 pounds but you think you look fine, you're not going to want to work towards the goal.

## Review

Review your progress periodically. Does the goal make sense? Are you stuck? Do you need to adjust certain parts of it?

## Inspiring

Frame the goal positively. Make it fun to accomplish. You could make a poster of the end result, frame it, and post it on the wall.

## Time-Bound

Give yourself a deadline for achieving the goal. Even better, split the goal into small parts and give yourself a deadline for each item.

## Planning Tips and Tricks

### Planning Tools

#### Guidelines for Efficient Planning

Life gets much easier when we have a plan and put it into action. Having a plan gives us a place to start, as well as being a way to remember what we are supposed to be doing at any given time.

Here are some guidelines for efficient planning that you can make work for you right away.

- Did you know that you can save yourself an hour each day just by **getting organized**? When you arrive at work or return home, take a moment to put your coat and keys where they belong. Put papers where you can put your hand on them quickly.
- Use your **workspace and personal space** (home, vehicle, garage, etc.) to their greatest advantage. There is no need to do a big clean up once a year if you can take a half hour once a week to file, sort, and keep things organized.
- It is important to identify and operate within **two time horizons**: short and long term. Anticipating events will help you to get things done in the short term which contribute to achieving long-term objectives.

- An **up-to-date master calendar** can be your most helpful planning tool. If you prefer an electronic version, make sure that it is backed up properly so that you don't lose your data.
- When things begin to get hectic, a "**Things to do Today**" list helps focus attention on the highest priority items.
- **Action planning worksheets, milestone charts, and PERT diagrams** (the types of diagrams used in project management) are excellent planning aids when properly used.
- **Planning contact** with colleagues and staff will help minimize disruptions. Keep a file for each person you meet with on a regular basis, with items to be discussed highlighted for easy reference.
- The most effective approaches to planning are those **tailored** to meet individual needs. Concepts, procedures, and worksheets should be modified to fit individual circumstances.
- Experts say nothing should be attempted without prior planning, although applying **flexibility** is also important.

### A Planning Checklist

For every plan you make, cover all these points:

- What
- Where
- When
- How
- Who

### Putting Plans into Action with Scheduling Tools

Some useful short term planning tools:

- A daily to-do list
- A planner with at least a week at a glance
- A monthly project list
- Project planning worksheet

### Organizing Your Work Area and Your Paperwork

A clean desk is not a sign of an empty mind! Don't fall prey to the false notion that a messy work area means you look busy, and thinking that if you look busy, then you're productive. Being active is not the same as being productive!

Here are some tips for organizing your work area.

#### Do it now!

Anything that takes less than 30 minutes should be done as it comes up. If it will take more than 30 minutes, add the task to your planner.

### **Dump.**

Throw out or take home all those things you have collected that you don't need or use. We're so used to holding on to things and sometimes are afraid to throw out the wrong thing. We like the same rule for work that we use at home: if you haven't used it for a year (or an entire business cycle), get rid of it, because you obviously aren't using it.

### **Sort and group.**

Your desk should be organized logically; pencils and pens in one place, another place for letterhead and envelopes. Have a basket for projects and another one for priority items so that you can locate the things you need when you want them. You can use the same kind of system on your computer so that you can find your working files. Once a project is complete, move it into an appropriate folder for retention.

### **Set up a system.**

Use a planner to jot down your daily to-do list and schedule in any tasks that will take longer than 30 minutes to do. Prioritize each item so that you know what to work on, and make sure that you stick to the list. (Maintain some flexibility for emergencies, but make sure you get back to priorities as soon as possible.)

### **Don't save papers that you can easily find somewhere else.**

Don't ask yourself, "Is there a chance I will need this someday?" because the answer is nearly always yes. Ask yourself, "If I know I need this, do I know how to find it?" One of our biggest time-wasters is searching for papers we know we have but we can't find. If a piece of paper is important enough to save, it is important enough to file for retrieval.

## **Setting Up a Routine**

Be dull in your everyday routine so you can be wildly creative where it counts. Routines simplify; clarify; and create order, symmetry, and familiarity in chaos and high stress. Routines are the foundation of success.

Top performers in every area of every industry have lives full of routine. Most of us have routines in the morning. Think about your morning routine and how, if you skip it (perhaps because you slept in late, or the dog threw up on the carpet!), you have a tougher time launching your day.

As you decide what kinds of routines will help you, you will need to simplify some things in your life. This is one of those things that is easier said than done, we know, but is well worth the effort. Consider your entire lifestyle. If you have an expensive lifestyle that consumes huge amounts of effort just to maintain, perhaps that time could be better spent doing more enjoyable things than maintaining homes, boats, cars, etc. Similarly, too cheap a lifestyle has a similar result. If you spend hours negotiating the cheapest

and the lowest rates, airfares, gas prices, etc., or have to shop for groceries at six locations in order to get the best price on everything, ask yourself if that is time truly well-spent.

Routines include setting time with family, for eating, for sleeping, and for exercising. It means setting a clear time for all routine activities. The way to get routines to work for you is to make sure you are setting them at times that work best for you and your biological clock. Your morning routines should be so good that when you walk out of your house, you feel ready to tackle any problems the world throws at you.

Remember:

- No activity is more important to ritualize than sleep. This lets your body know that it is time to slow down and prepare to shut off.
- By fixing mealtimes and planning in advance you'll become vastly more efficient. You'll save money on groceries too!
- Since exercise has such a powerful effect on brain energy and alertness, place your workout at times of day you most need them.

## Doing it Right

### Being Brave and BOLD

Sometimes we need to approach things with a bit of attitude in order to get things done, and do them well. We're recommending that you can be a bit playful with this, and to be BOLD.

### Balance

Do you spend a lot of time looking for things? Productivity research tells us that the average person spends about 10% of the day looking for things. If that were so, you could gain 5 weeks a year just by getting your retrieval methods under control! If you tend to keep good track of things at work, consider things at home. Do you have a place for your keys, glasses, or lunch bags? Do you ever find yourself searching for things in the morning right before you leave for work? How long does it take you to find a particular file on your computer? (This is often one of the worst time suckers out there today!)

Sometimes you just need to handle the little things that reduce concentration and cause anxiety, like the clutter on your desk and the incomplete jobs. This is the opposite of prioritizing. Do the quick and dirty tasks NOW, even if you just do them for 5 minutes a day for the next two weeks. The crises in our lives are often the result of not handling the little things or not reacting to a niggling feeling that something is wrong. Ignore the little toothache and you wind up with a root canal.

While we talk a lot about balance, if we could accept the fact that each day is not going to be perfectly balanced, we'd probably be a lot more content with our work. Some days there will be nothing but fires to put out, but this can be balanced with days that are quieter and the phone isn't jangling off the hook. Balance can also come from setting your work aside and going for a brisk walk at lunch, or phoning

someone that you care about. Achieving balance is not necessarily about spending equal time on the things you like versus what you don't like: it can be about the value of things. A big smile and a quick lunch with someone can balance out a morning spent in a frustrating meeting.

### **Organize Your Time**

If you are receiving tasks and assignments by e-mail, or your boss delegates assignments to you, make sure you organize these incoming items immediately. If something will take more than 30 minutes to complete, schedule it in your calendar and prioritize the items there. If the task will take less than 30 minutes, try to get it done right away so that you are not procrastinating over it, or don't forget that it needs doing.

### **Let Things Go**

There is a rule we often follow at home that says if you have not used an item of clothing or kitchen gadget for a year, get rid of it. We need to apply the same thing to work: when you no longer need things, get rid of them. It's rare that we actually get rid of things we need, but if we do, it's not likely to be the end of the world. You can replace it if you need to.

If you are someone that has a hard time throwing things out, put them into storage first, and then set up an archiving date within 12 months so that they move from storage (which is usually very expensive) to the shredder or rubbish bin.

If you are going through a stack of paper or items, start out with three piles, and act on them quickly. Sort them into piles to: shred, store, or dump in the garbage.

### **Delegate**

Don't waste your time doing things that somebody else can do, especially if they can do them better than you. Save your time for those things which you are uniquely qualified to do. In addition to easing up your workload, delegation helps your staff to learn new things and to take risks where they have you there for back up if needed.

Delegating does not mean that you "give away" work completely. As the owner of a task, you must remember that you are ultimately responsible for the results that are achieved.

If you are not in a leadership position, you may be thinking that you don't have anyone that you can delegate to, but that's often not the case. In many work teams, we can delegate laterally to a colleague who has a particular expertise, who is looking for some skill development, or simply has some extra time.

In *The Creative Edge*, author William C. Miller defines five levels of delegation:

- **Tell:** "Based on my decision, here's what I want you to do."
- **Sell:** "Based on my decision, here's what I want you to do, because..."
- **Consult:** "Before I make a decision, I want your input."

- **Participate:** “We need to make a decision together.”
- **Delegate:** “You make a decision.”

You must find ways to delegate, no matter what your position is. Learn to clearly define who is to do what and let them show you that they can do it. Make sure your communication is clear so that they know what your expectations are and any limitations of the assignment (i.e. budget, time frames, or other resources).

There are five steps to the delegation process:

- 1) Explain why the job is important.
- 2) Describe what is needed in terms of results (not how, but what).
- 3) Give the person the authority they need to do the job.
- 4) Indicate when the job needs to be completed and get agreement.
- 5) Ask for feedback to ensure a common understanding.

### **The Story about Everybody, Somebody, Anybody, and Nobody**

There was an important job to be done and **Everybody** was asked to do it. Everybody was sure that **Somebody** would do it. **Anybody** could have done it, but **Nobody** did it. **Somebody** got mad about it because it was **Everybody’s** job. Everyone thought that **Anybody** could do it, and **Nobody** realized that **Everybody** wouldn’t do it. It ended up that **Everybody** blamed **Somebody** when actually **Nobody** blamed **Anybody**.

### **Putting an End to Procrastination**

In some workplaces, it seems to be impossible to get everything done. This session will help you prioritize what does need to be done and sort it out from things that you could do, but may not have the time to finish.

Brian Tracy wrote a great little book called *Eat that Frog!* that helps people get over procrastinating. He also plays with a couple of quotes from the writer Mark Twain that help us to remember what we are meant to do, and how to stop putting things off. The idea is this:

“If the first thing you do each morning is to eat a live frog, you can go through the day with the satisfaction of knowing that is probably the worst thing that is going to happen to you all day long.”

We are often guilty about procrastinating, and this stops us from getting things done. And as you likely already know, when we procrastinate about one thing, it can also interfere with getting other things done.

As Mark Twain said, “The rule of frog eating is this: If you have to eat two frogs, eat the ugliest one first.”

This quote is about taking the frog – the thing we are procrastinating about – and getting on with eating it. Clearly, after you’ve eaten a great big frog, everything else you have to do that day is going to be easier than what you started off with.

By procrastinating, that thing we are putting off often becomes a bigger and more daunting task than it really is, and the more we think about (rather than doing something about it), the more space it can take up in our head.

This is a very simple concept that can have a profound impact on our results. There is no self-satisfaction in knowing that we are letting things get away from us, and we feel better and more motivated when we go ahead and get these things crossed off our to do lists.

## Planning Wisely

### Getting Organized

Getting rid of clutter is one of the best things we can do to make a more efficient work environment. For some people, this is a daunting task. If you tend to accumulate clutter, or are embarrassed about it, this task can best be done on a weekend, and with a friend. In addition, we recommend that when you schedule time for this task, you double it. An hour to clean out our office never seems to be quite enough, so allow yourself the luxury of two hours instead.

#### Surface of the Desk

Look at your desk. The object is to purge both the work surface and the contents of the desk. If the surface is already clear, that's great! However, if there are items on the desk, ask yourself if they are necessary and/or in an effective location.

- Check the position of the desk: Is it facing the door and making interruptions more likely?
- Is the lighting adequate?
- Is the phone where it can be reached easily?
- Is there a better arrangement possible?
- Is the seating/chair adequate?

Your first step should be to get rid of things that should NOT be on the desk. Check everywhere. Look under the blotter, on the walls surrounding the desk, in trays, etc. Collect all bits and pieces and de-clutter by noting the information in an appropriate spot and discarding it.

#### Contents of the Desk

Then move to the contents of the desk. Focus first on the tools you use, such as pens, pencils, and erasers.

Check to make sure of the following:

- You have all the tools you need and they are in good working order.
- Tools are organized so that similar tools are together and easily accessible. Useless tools should be discarded or moved to an area to be fixed.

- Group like items together; for example, stationery, envelopes, and stamps are all in one drawer.
- Store any extra supplies in a supply area.
- Tools should be stored in a shallow desk drawer and are not on the desk.

### **Guidelines for Keeping a Piece of Paper**

#### **Am I going to need to refer to this later?**

- YES: File it
- NO: Recycle it

#### **Do I have a digital copy that will suffice?**

- YES: Recycle it
- NO: File it

#### **Is it directly related to me or will someone else have a copy that I can refer to?**

- YES: Recycle it
- NO: File it

#### **Do I need to keep this for legal reasons?**

- YES: File it
- NO: Recycle it

#### **Does it fit in my filing system?**

- YES: File it
- NO: Recycle it

#### **If I file it, will I be able to find it?**

- YES: File it
- NO: Recycle it

## **Organizing Your Files**

### **Sorting Based on File Type**

The key principles of retrieval are:

- Group similar things together
- Place them in their own space or container
- Label them clearly

## **File Categories**

There are some additional steps we can take depending on what kind of files you are trying to organize. We can usually divide our files into four categories.

### **Working Files**

These include your current projects, routine functions, and quick references. These are the files where you have 80% of your work. These should be within arm's reach. They usually contain the following:

- The projects you are currently working on. This file should be cleaned occasionally to move projects to a reference file or to eliminate duplication.
- Fingertip information you need on a routine or daily basis, such as phone lists, client addresses, and computer codes.
- A follow-up file for each person with whom you come in contact on a regular basis, where you keep track of all correspondence with that person.
- A file for routine functions such as sales reports or other functions performed daily/weekly/monthly.

Since these files should be within reach, they might be in a large desk drawer. Make certain they are in file folders, labeled in large letters, and then placed in hanging file folders that are also labeled.

Usually it is more efficient to label hanging folders by category, rather than by a letter of the alphabet. Then categories can be alphabetized or color-coded.

### **Reference Files**

These are files you must refer to frequently as you work on current projects. This is where the bulk of your files will be located. Since you use these files regularly, they need to be kept handy, but not necessarily within arm's length. The most important thing is to arrange all information in such a way that you can pull information out of the file easily.

Key questions for you to consider as this file is set up:

- What do I want to keep?
- What do I need to keep?
- If I wanted this information, could I find it elsewhere?

Information that should be in the reference file includes:

- Research for future projects
- Past projects to which the client refers

It can be helpful to consider key functions or components of your job, and make these the major categories for reference files. Other files might include:

- Sponsor files

- Administrative information

Cull all duplicates or useless paper. Have a recycling bin and shredding container nearby.

Establish subject categories, and label both file folders and hanging files. Put the file structure on paper prior to starting the filing.

Label file drawers and create a master list of files if the amount of information is large. Remember to use large, clear print with a fine tip felt marker.

### **Archive Files**

These are the files nobody looks at. You keep them because the law says you must, because you are afraid you'll need them if they are thrown out, or because nobody wants to take the time to do anything about them. They should be kept in a designated location far from your work area.

### **Disaster Files**

This is one file that contains all vital information, including identification and financial references, in case you have to vacate the office unexpectedly. You can also have a file like this at home so you have things organized in the event of a disaster.

### **Electronic Files**

The key rule is that the file structure used in paper files and electronic files should parallel each other so that you can find things quickly. Use keywords and search programs to help you find your files even faster. If you are not sure how to use keywords, the "help" section of your software program should be able to show you how.

In this information age, we have to know what we need to keep and what we don't need to keep. Don't keep what you don't need. Don't ask, "Will I ever need this?" The answer is almost sure to be "Maybe." Ask instead, "Where could I get this if I needed it?"

### **Briefcase**

Your briefcase should be organized with:

- Tools that are needed frequently when away from the office
- Reference files that are frequently referred to, such as telephone lists
- Working files that are needed
- A system for expenses

## **The Batching Technique**

The balance to the "do it now" approach is batching. With this technique, you save several of the same type of things to do at once. Sometimes that is a more effective technique than doing each thing singly.

We can even batch our interactions with others. Do you ever remember what you wanted to ask someone or tell someone just after they walked out of your office or you hung up the phone? You might save quite a bit of time by having a file for each of the people you interact with often.

Here are some examples:

- **Word processing files:** Batched and placed in categories. Develop a tree of directories and subdirectories, using the same categories as in the paper filing system.
- **E-mail messages:** Again, create directories and save only those messages that will be referred to again. Delete e-mails that you will not need again. (If that panics you, move them to an archive file.)
- **Voice mail:** Listen to your voice mail message. Does it do a good job of telling the person at the other end of the line what he/she should do? Try keeping a list of all the people you need to call, and make those calls all at once.

## Managing Your Workload

### Managing E-mail

One of the greatest demands on our time is e-mail, and so it is important to put it in proper perspective with the demands of our jobs. We've become a society where we expect replies to e-mail immediately. Many people send e-mails out to more recipients and with more frequency than is often required.

While e-mail has become a benefit in many ways, it is also a huge contributor to people's stress. And it's not enough to just be able to check an e-mail on a computer somewhere; many managers have a hand-held device that allows them to be connected to their e-mail 24/7.

Let's see what kind of an impact it has on your day in terms of time.

- How many e-mails do you receive in an average day? \_\_\_\_\_
- How many of those e-mails do you reply to? \_\_\_\_\_
- How many e-mails do you send (not including the replies)? \_\_\_\_\_

Let's say that an average e-mail takes you three minutes (and that is only if they are short and need very quick thinking on your part).

- Total from above: \_\_\_\_\_ x 3 = \_\_\_\_\_
- **This is the total number of minutes per day that you manage e-mail.**

Look carefully at that number. It is not unusual for us to talk to managers who receive, reply, and create up to 100 e-mails per day. 100 e-mails a day is equivalent to 300 minutes, or five hours of time each day!

Since we normally have lots of additional tasks in the day in addition to e-mail (like meetings, administration, performance management, and coaching), is it any wonder that we struggle to get through the day? Add to this the time you might take to read reports, meeting minutes, or agendas;

process information; or work on projects; eat a healthy lunch; and perhaps invest some time in your people; and it's no wonder we are often looking for more time!

## Workload Analysis

These questions form the basis of workload analysis:

- What are the things you have to do every day? How much time must you allot to each thing?
- What are the things you have to do each week? How much time do you allot to them?
- What are the things you must do each month? How much time does each item take you?
- What are the things you do quarterly or annually? How much time do they take?

It's a real pain, but by doing this analysis, you will probably realize that there are more things to do than there is time to do them. Keep in mind that most of us are overly optimistic about how much time we need for activities and don't allow enough time for them. This is the point at which you begin to prioritize. You may even see that some of the things you are doing don't have any real impact on your job; usually when you get everything tallied up, you have about two and a half minutes a week to do your primary job for your organization.

We forget to schedule things if they are just in our head. You aren't being paid to be a calendar. If you schedule them in, in pencil, you can begin to protect them. We don't like doing this. It brings face to face with the reality of our situation. It's scary.

### The 168 Hour Plan

Let's look at how you spent your time last week. There are 168 hours in seven days, so consider how you used them. Jot down how many hours you spent in each category.

Task	Number of Hours
<b>Personal Life</b>	
Sleeping/eating	
Grooming/hygiene	
Driving or riding	
Exercising	
Cleaning/maintenance	
Talking to family/friends	
Mail/personal business	
Volunteering	
Praying/attending church/meditating	
Studying/reading	
Relaxing/watching TV	
Thinking/worrying/planning	

Other	
<b>Sub-Total</b>	
<b>Business Life</b>	
Planning/research	
Paperwork/computer	
Talking to co-workers/staff	
Appointments/meetings	
Clients/customers	
Phone calls	
Production	
Other	
<b>Sub-Total</b>	
<b>GRAND TOTAL (168 hours)</b>	

### Further Reading:

- ✓ *Time Management, (1996), By Chris Croft*
- ✓ *Successful Time Management, (2013), By Patrick Forsyth*