



UNIT-15

Improving personal Efficiency

Learning Outcomes

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

- Identify what personal efficiency is, what skill sets can improve your personal productivity, and what attitudes we should cultivate
- Explain why multi-tasking is a myth
- Describe what role long-term goals play in short-term efficiency
- Share a personal vision and develop dreams and goals from it

Unit 15

Improving personal Efficiency

Understanding Personal Efficiency

Defining Personal Efficiency

Operating at your most efficient means different things for different people. We think that David Allen hits the nail on the head with the term, “high-performance workflow management.”

To us, personal efficiency mean:

- Having a system to handle all the things that life throws at you so that you can stop worrying and start enjoying life
- Being able to have a good life/work balance, so that you don’t have to take work home with you, consider your laptop a family member, or miss any more soccer games
- Being able to achieve long-term goals, rather than just completing the necessary day in/day out tasks in life
- Living rather than just being!

In the Groove

When jazz musicians are at their absolute peak, playing better than they ever have before, they say they’re “in the groove.” What might being in the groove look or feel like for you? It might mean:

- Feeling in control
- Not feeling overwhelmed
- Feeling positive
- Low level of stress
- Time goes by quickly
- Mind isn’t racing with thoughts
- Easily able to focus on the task at hand
- Work seems more enjoyable

These results can’t be accomplished just with a new skill, or even a single skill like time management. (In fact, in the next lesson we’ll talk about a whole range of skills that can help you become more efficient and effective.) Many productivity experts, including David Allen and Stephen Covey, feel that a holistic approach is needed to truly improve productivity.

Making many small changes plus a few large changes, plus a whole new outlook on getting things done, is called a **paradigm shift**. This is what you need to start working towards your personal best: not a band-aid solution or quick fix, but a whole new attitude and new ways of using the skills that you already

know, plus a commitment to keep improving your attitude and skills for the rest of your life. Sounds like a big obligation? It is. But we guarantee that the results will be totally worth it.

Time Management vs. Personal Productivity

To many people, personal productivity is just a new buzzword for time management. We can assure you that this is not the case!

Time management evolved as a discipline in the 1980’s. Its focus was on schedules, daytimers, and to-do lists.

These tools are still valuable, but we need additional tools for today’s dynamic workforce. Work isn’t as clear-cut as it once was. For example, farmers didn’t need to-do lists; the work that they needed to do was pretty obvious. (Who needs an alarm clock or reminders when the horses are hungry or the cow needs to be milked – they’ll sure let us know!)

For most of us today, that isn’t the case. If you’re given a project to improve customer service, what does that mean? How do you know when you’ve reached your goal? How do you know what to do to achieve that task? Personal productivity stretches beyond traditional time management approaches to include long-term goals, project management skills, problem-solving tools, and more, to help us define and accomplish tasks efficiently and effectively.

Developing the Right Attitude

Useful Skill Sets

Brainstorm some skill sets that might be useful in becoming more efficient and productive.

Useful Attitudes

Flexibility is key.

Be ready to try new things and change your approach if what you're doing isn't working.

Focus on what you know.

You probably already have many of the skills and a lot of the knowledge required to become more effective. It isn't as hard as you might think!

Remain optimistic and be persistent.

Change is never easy but the rewards will be worth it. You might want to make a list of benefits you hope to see from being more productive, or rewards you can give yourself when you achieve something.

Have faith in yourself.

Focus on what you are doing well and how you have improved. As well, build a good support system to encourage you.

Don't be afraid to try new things, to make mistakes, and to fail.

After successfully inventing the light bulb, Thomas Edison said, "I never failed once. It just happened to be a 2000-step process."

Why Multi-Tasking is a Myth

Most of your current habits and attitudes will find a place in your new, efficient outlook on life. However, there is one habit that we want you to stop right now: multitasking.

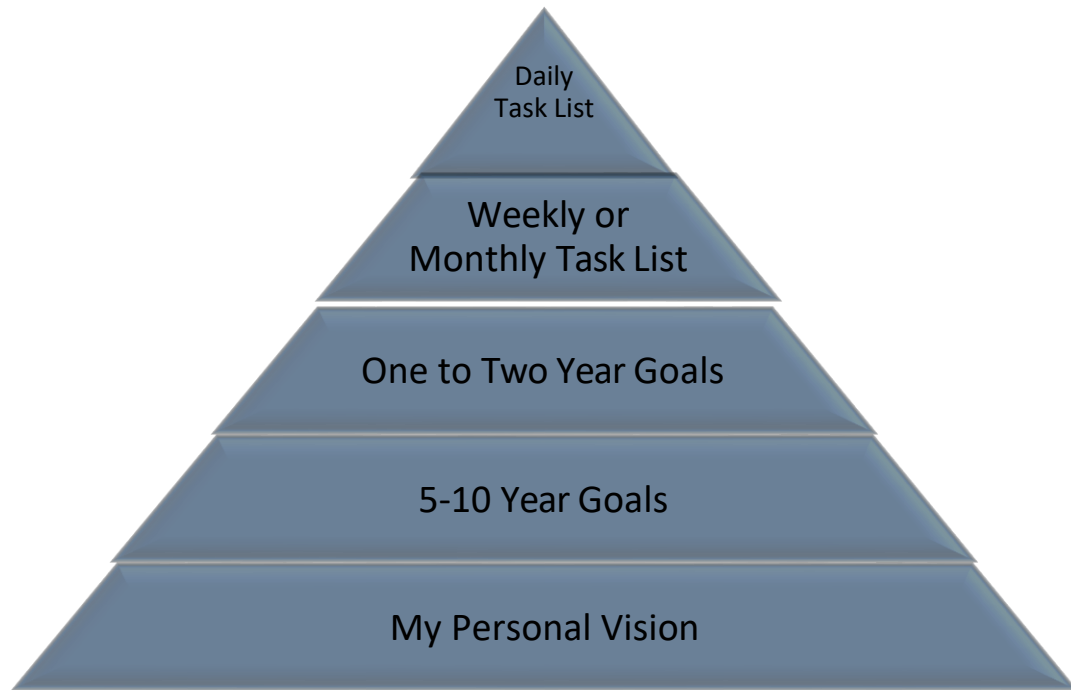
We think that Henry Ford said it best: "A weakness of all human beings is trying to do too many things at once." When you are doing two or three things at once, you're not focused 100% on each task – you're only giving 50% or 33% to each task. With a good information management system, you will be able to decide which task is most important, focus on it 100%, complete it, and then move onto the next project.

Laying the Foundation

Creating a Personal Vision Statement

The Pyramid Structure

If you want to feel like you're getting more out of life, then we recommend that you set a personal vision statement. This will then help you set short- and long-term goals, which should influence your daily plan. Think of it like a pyramid:



There are three important steps to creating your personal vision.

Step One: Identifying Your Values

The list below reflects some common values. **Choose the ten that are most important to you** as a person (meaning that they apply both at work and at home). You can customize the wording, or add your own to the list.

Ability to make decisions and implement them	Ability to persuade and influence others	Achieving excellence
Achieving fame and recognition	Adventure and excitement	Behaving ethically
Being challenged by pressures and deadlines	Being organized and dependable	Being skilled and capable

Building a family	Building meaningful relationships with others	Competition with others
Contributing to society	Cooperation with others	Demonstrating expertise
Diversity in daily tasks	Doing something meaningful	Efficient and effective
Enjoying what you do	Environmental rights	Establishing a reputation
Expressing creativity	Feeling excited and stimulated by life	Feeling independent
Feeling of belonging and community	Feeling of inner harmony	Feeling of patriotism
Financial security	Financial wealth	Free speech/human rights
Freedom to set your own pace and goals	Having a feeling of security	Having power and control
Having privacy	Helping those in need	Religion and/or spirituality
Leading others to success	Moving at a fast pace	Moving at a slow pace
Being productive	Reliability	Self-development
Sense of accomplishment	Serving the public	Spontaneity
Truth and integrity	Working as part of a team	Working individually

We cannot focus on too many things at one time and remain effective, so look at the ten values you selected and **select the five that are most important** to you. Cross the others off. Be firm with yourself if you need to be. Remember, you are focusing on what is really important to you.

Next, **reduce the list to just three values**. These are the things at your very core. Cross the other two off your list. Put circles around the three items that are your core values. You can also write them below.

Bringing It All Together

Step Two: Defining Your Values

Now, outline what success for each of those values would look like.

Value One

Value Two

Value Three

Step Three: Putting It All Together

Finally, bring the three statements together into one paragraph. You may feel that you need to go back and re-evaluate your values, or you may want to re-work some sentences to create what is meaningful to you. That's OK! Above all, this should be a reflection of your innermost thoughts and a roadmap for how you would like to conduct your life and your work.

Write your vision statement below.

Test your knowledge

How could your vision and values statements guide your day to day planning and prioritizing?

Identifying Dreams and Setting Goals

Identifying Your Dreams

Once you have a good understanding of where you want to go, it's time to sketch out what that might actually look like.

What areas of life do you want to set goals in?

In our example above, our vision statement was:

“In my life, I would like get the most out of each day by being as productive as possible. For me, being productive means feeling good about what I have accomplished at the end of the day. It is important to me to do this in a way that allows me to feel good about my choices and to have a sense of inner peace. As well, I need to feel challenged in my life. I like overcoming new problems and having new experiences.”

My specific dreams might include:

- Set up an organized home office.
- Start my own consulting business.
- Learn how to do yoga and practice it daily.
- Climb Mount Everest.

Now, clearly some of these are achievable in the short term while others will take longer. Some will obviously take more work than others.

Goals with SPIRIT

Each objective should be broken down into several small, achievable goals that will help you get where you want to go. Good goals should have 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

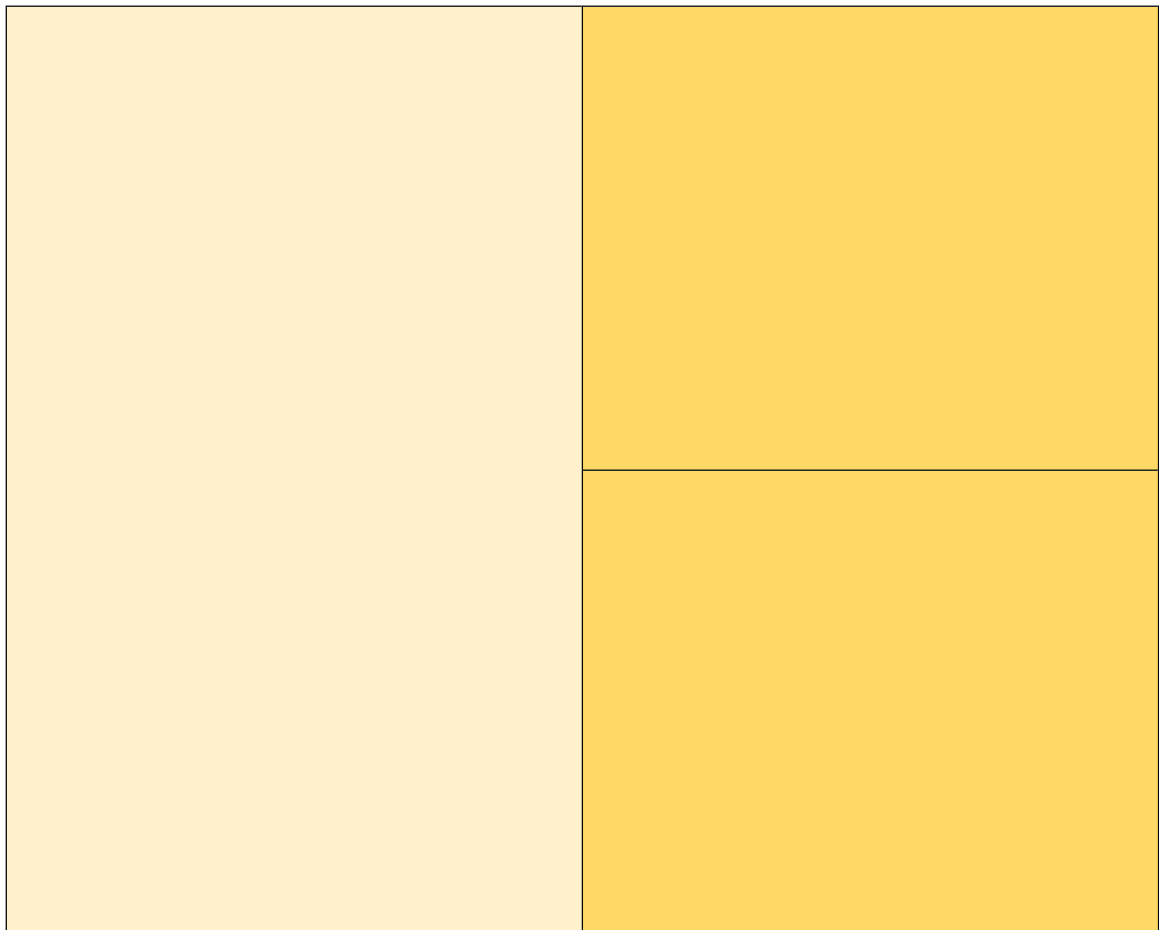
Frame the goal positively. Make it fun to accomplish. You could make a poster of the end result, frame it, and post it on the wall.

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.

My Dreams and Goals

Divide a sheet of flip chart paper into three parts, like this:



In the **large space**, draw one or two life dreams. In the **top small space**, list a few objectives to support your dreams. Then, use the **bottom small space** to list some specific goals for the objective that you want to achieve next.

The Building Blocks of a Good Organizational System

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Pareto's Principle

Vilfredo Pareto (1848-1923) was an Italian economist and sociologist who made extensive use of math to analyze economic problems. One of his most famous theories is the 80/20 rule – the idea that 20% of situations dominate 80% of events.

This means that:

- 20% of your actions produce 80% of your results
- 20% of your products account for 80% of your sales
- 20% of the population holds 80% of the wealth
- 80% of software problems are caused by 20% of known bugs

Characteristics of a Good Organizational System

Test your knowledge

Consider your experiences with organizational systems and productivity tools. What works? What doesn't work?

Works	Doesn't Work

Building a Customizable System

Different tools work for everyone. It's important to take the elements that work for you and incorporate them into a system that makes sense. For example, several productivity experts abhor to-do lists and feel that they should be abolished. Many other people would disagree.

Likewise, you may need custom elements for your particular work or life situation. A production office might have a matrix on a whiteboard outlining each item in production, its stage of development, and the person working on that stage. You might picture that and think, "Geez, I'd never make that work." Or you might think, "Hey, that would work great for my new project!"

Don't be afraid to borrow ideas, customize them, and try them out for a few weeks. If it works – great! If not, take what you've learned and try something else. You will find that your productivity needs will change with time, and your tools and systems will need to change, too.

Creating the Right Environment

Garbage Out!

Before we can start being more productive, we need to create the right environment. Earlier today, we learned how to get our minds in the right place. Now it's time to set up your physical space. Your first task is to clear your space of junk.

Step One: Gather Materials

First, gather the materials that you will need:

- Marker and pen
- Notepad
- Sticky notes
- Garbage bag
- Two recycle bags, one for direct recycling and the other for shredding sensitive materials (mark them in some way)
- Three boxes labeled Sort, Store, Give Away/Return
- Extra boxes and bags
- Blank sheet of paper

- Timer

Place them all in one visible area where you will not lose them.

Step Two: Make an Action Plan

Next, decide what area you are cleaning:

- Your office (which should include your purse or briefcase)
- A closet
- Your car
- A particular room in your house

If you are tackling an entire room, sub-divide it into smaller areas (i.e. desk, filing cabinet, scary pile on the floor). Number each area with a sticky note. You must tackle only one area at a time or you will get overwhelmed and you won't be able to finish the task.

Step Three: Get Started

1. Choose a time where you will have several uninterrupted hours to organize.
2. Make sure you have all materials close at hand.
3. Write down a small reward on a sticky note. Set the timer for 30 minutes. Put the sticky note on it.
4. Place the three boxes and the three bags in the middle of the floor. Place the blank sheet of paper there also. This is where you will stack papers.
5. Tackle your first area. Put each item in the appropriate bag or box.
 - Make sure to separate bundles of papers.
 - Do not read papers or try to organize as you go. Simply place the item in the correct box, bag, or paper pile.
 - If you think of another task to be done, write it on your notepad.
 - Likewise, transfer any notes on scrap paper, napkins, or stickies to the notepad.
 - All areas should be empty of everything! Yes, this means a clear desk too!
 - When you fill a box or bag, put the lid on it or tie it up, set it aside, and get a new box or bag.
6. When the first area is completely empty, double-check! Nothing should be left, including:
 - All stickies decorating your area
 - All items taped or tacked up
 - All trays, file folders, and other organizational items (yes, we mean all of them – no exceptions!)
 - All calendars except the one that you use (set this aside)
 - All papers, including those inside filing cabinets
7. Work until the timer is up. Make sure to note where you left off.

8. Take your reward break. Try not to be gone for more than 15 minutes.
9. Return to your area. Continue to sort until all areas have been completed.
10. Take a deep breath and look around. The only thing remaining should be the bags and boxes. Stack these neatly and take a quick break. Congratulations on completing this step!

NOTE: In some cases, clearing out the filing cabinet might not be practical. If your filing cabinet contains items like reference documents ordered chronologically and indexed by year, you don't need to purge it.

Step Four: Finish the Task

Now it's time to finish what we started. Let's tackle the garbage bags first.

- Shred sensitive materials.
- Take out the trash and recycle bags.

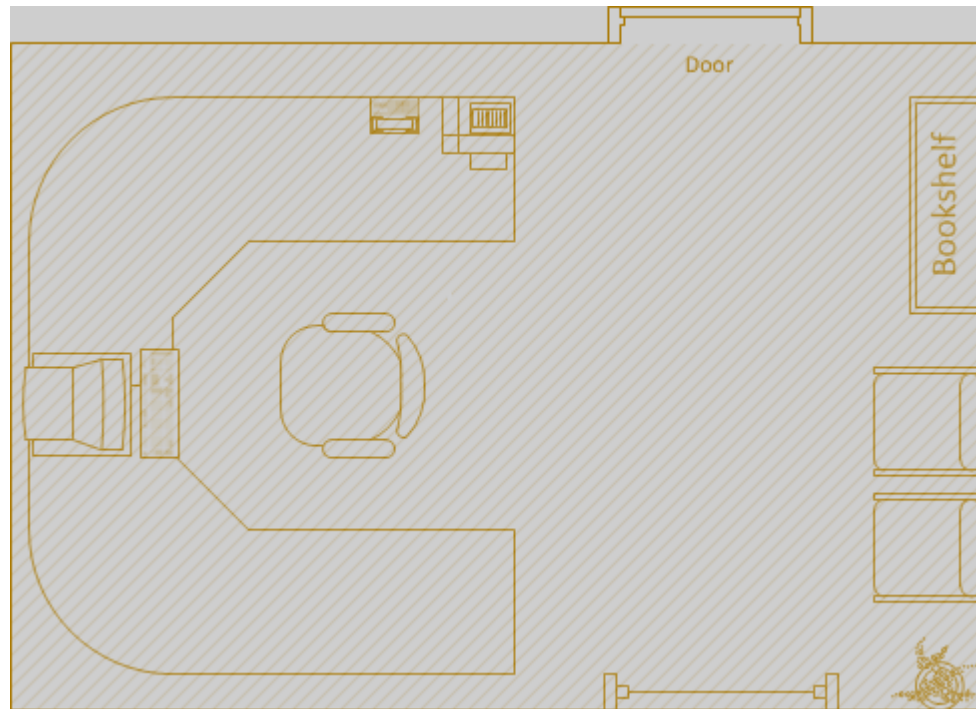
Now we have three boxes and one paper pile. Sort through the **Give Away/Return box**. Return any items that don't belong to you and take the rest of the box to a charity site. Do this now! (Get yourself a coffee while you're out, if you like.)

Finally, place the lid on the **Store box** and tape it shut. (This will prevent you from opening it later.) Put it in your storage space, a closet, or call your archiving company to come get it.

Now we just have our box of items to sort. Let's get our workspace organized first.

Laying Out Your Workspace

Now that you have a clean slate, this is a good time to arrange your workspace. Here is a diagram of our preferred layout:



We understand everyone may not have a workspace as large as this, or the ability to move furniture around. However, we'll list what we consider the most important features of a workspace. Implement whatever works for you to create a more efficient working layout.

Desk

- Should be placed so that your back is to the door.
- Best shape is U, with the short part facing the wall. Computer typically goes in the inner part; phone, printer, and outgoing files go on the side facing the door; and a clear working area faces away from the door.
- Surface should be kept clean at all times! Exception: If you have a paper or electronic planner, you can keep that open on the surface while working.
- Tools should be placed in a drawer, not on the surface.
- Hang mementos on the wall instead of placing them on the desk surface.
- Trash and recycle bins should be tucked under a convenient part of your desk.

Bookshelf and/or Filing Cabinet(s)

- Should be placed against a wall.
- Make sure you can open the drawers without hitting anything.

- Top surface should be kept clear. Exception: If you have a small desk, you can use the top for pending files, as we will discuss in a moment.

Guest Chairs

- Placed together in a corner and/or against a wall.

Greenery

- Place in a corner, on windowsill, or hang from ceiling.
- Can be artificial or real, depending on your office policy.
- Spider plants are easiest to take care of.
- Will give a bit of life to your office.

Re-Designing Your Workspace

Pull out your pre-assignment: a floor plan of your office.

- Identify trouble spots in your office (i.e. places where things tend to collect or have collected).
- Review the layout of your furniture.
- Design a new workspace without the clutter and with the furniture in a more workable layout (if possible).

Use the space below to list tasks that would be involved in your office re-arrangement.

Setting up a Daily System

Now that we have a clear, functional working area, let's set up a daily system. We need something that will:

- Remind us when a task is due
- Save us from hunting for documents when we need them
- Allow us to focus on daily tasks and not worry about things slipping through the cracks

Priority Tray

The first element to this system is the priority tray. This should be a shallow tray in a corner of your work area. It will contain whatever you are currently working on at the moment, plus any emergency items.

Typically, you will work on one item at a time. If someone rushes in with something that must be done right away, you can place your current project in the priority box, switch to the emergency task, and then go back to your project right away.

The priority tray must be empty at the beginning and end of every day. Don't let it become a black hole!

The Incubator

Also known as a pending file system or a tickler file, the incubator will keep all documents that require follow-up in one place. This file should be placed within easy reach but out of sight. A good place might be the top of a filing cabinet, or, if space is short, on a windowsill.

Here is what you will need:

- A hanging file holder
- 12 hanging folders
- 31 manila folders
- Felt-tip marker and a pen

First, label the hanging folders with each month in the year. Arrange them chronologically with the current month in front. Then, label the manila folders from 1 to 31. Put the folders for today until the end of the month in this month's folder. Put the remainder of the folders in next month's folder.

So, if today is February 12, my incubator will look like this:

- February
- 13
- 14
- 15
- 16
- Through to 28

- March
- 1
- 2
- Through to 12, plus 29-31 (as February doesn't have those days)

- Folders for April through to January

Now, file any items according to when you need to access it in order to complete it on time. So:

- A brochure that you need to review for a conference in June would be placed in the June folder.
- An invoice that needs to be paid by March 15 would be placed in the March 1 folder.
- A ticket for a concert on February 14 would be placed in the February 14 folder.
- Christmas gift ideas would be placed in the December folder. (It's never too early to start planning!)

At the beginning of each day, take the folder for that day. Review its contents. Handle anything that you can right away, and place remaining items in your priority tray. Place the date folder in the next month. At the end of the day, if there is anything left in your priority tray, re-file it in the incubator.

When the month ends, check the main folder for the next month and file any stray items by date.

If you don't have a lot of follow-up tasks, one hanging file folder might do the trick. However, we strongly recommend the incubator system. Try it for 30 days!

Setting up a Filing System

Now, let's set up your filing system. We recommend setting up four types of files.

Overall Structure

First, decide on a main repository for the particular type of file. For paper files, this might be a filing drawer in your desk or a filing cabinet. For electronic files, we recommend keeping all files in an easy-to-access location like My Documents, the Documents library, or a folder right on the C drive.

Then, set up folders and sub-folders for both your paper and electronic files. Folders should be named according to a client, project, or task. Keep naming consistent in both electronic and paper systems. Here are some examples:

- If you are a marketing consultant, you would have folders for each client you work with.
- If you are a writer, you would have a folder for each book that you are working on.
- If you are an administrative assistant, you might have folders for the various managers you support, with folders inside each manager's folder.

Make sure to give electronic files a standard name. Don't include the date as this can easily be viewed when you are viewing the files. If you often use portable electronic storage, keep the names consistent with your main storage point and make sure to update the main files as soon as you are back in your office.

Active Files

These are items you access daily, such as a directory of phone numbers or e-mail addresses, standard operating procedures, and checklists.

Electronic files should be kept in your main storage point, with a shortcut on the desktop or another convenient location. **Paper files** should be kept in the filing drawer that is closest to you.

Working Files

These are items you access weekly or monthly, such as information for weekly reports or notes for monthly meetings. **Electronic files** should be kept in your main storage point, organized by project, client, or task. **Paper files** should be kept in a filing drawer within easy reach.

Reference Files

These are items you access yearly, like previous annual reports or active personnel records.

Electronic files should be kept in a sub-folder of your main storage point named Archive or Reference. They should be organized into sub-folders according to client, project, or task. **Paper files** should be kept in a filing cabinet in your office.

Archive Files

These are items you do not access on a regular basis but need to keep for legal or tax reasons, like previous tax records or old personnel files. **Electronic files** should be kept in a separate storage point, such as a USB drive or on CD or DVD. **Paper files** should be kept in a storage point outside your office. Only keep what you absolutely need!

Filing Tips

Place folders in the drawer alphabetically and color-code your files by type. For example, you might have red folders for forms, yellow folders for tax information, and blue folders for financial data. (Use whatever colors make sense to you.) File information in a consistent manner, typically from front to back chronologically.

Putting Everything Back Together

We haven't forgotten about the Keep box in the middle of your floor, or the big pile of papers! You can file all of these items in your brand-new, organized system. You will need to make adjustments as you go. That's OK!

Putting it in Action

What ideas do you want to try when you go back to the workplace?

How will you customize the tools provided?

What might not work for you? Why?

What other tools will you use that we did not discuss here?

What will be your first step?

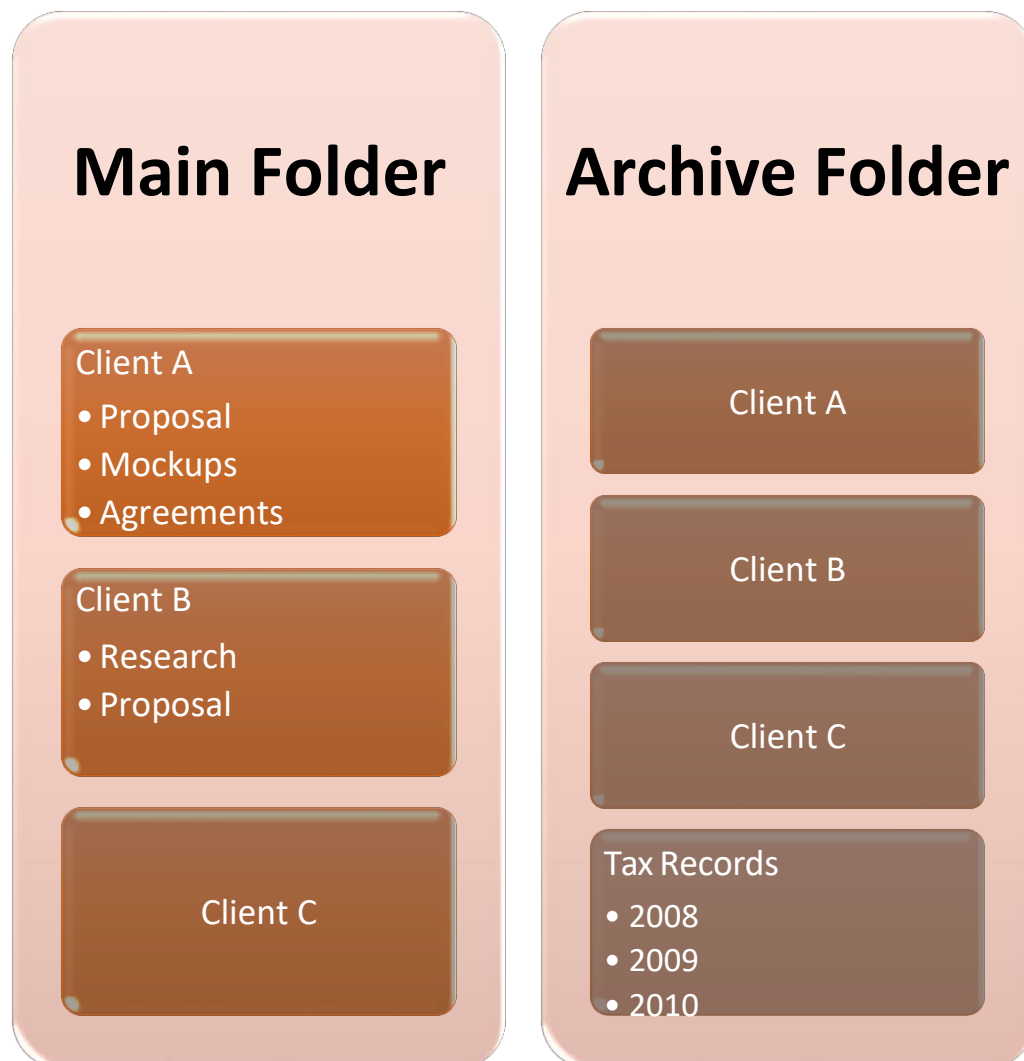
Outline an action plan for organizing your workspace and files.

Setting Up Your Virtual Environment

Organizing Electronic Files

Suggested Structure

We'd like to take a moment to talk a bit more about organizing your electronic files. It is vital that you are as meticulous with your electronic files as you are with your paper files. We suggest a structure like the following:



Tips and Tricks

Operating system features may help you, such as:

- File properties
- Keywords and tags
- Search programs

Making Your E-Mail Program Work for You

Process Overview

Your e-mail inbox should be like the priority tray on your desk: empty at the beginning and end of each day. We're not joking! Here is a simple seven-step plan to making your e-mail program work for you.



Commit to Your E-mail Program

Take a long, hard look at your relationship with your e-mail program. Are you happy with it? Does it serve your needs? Is it up to date?

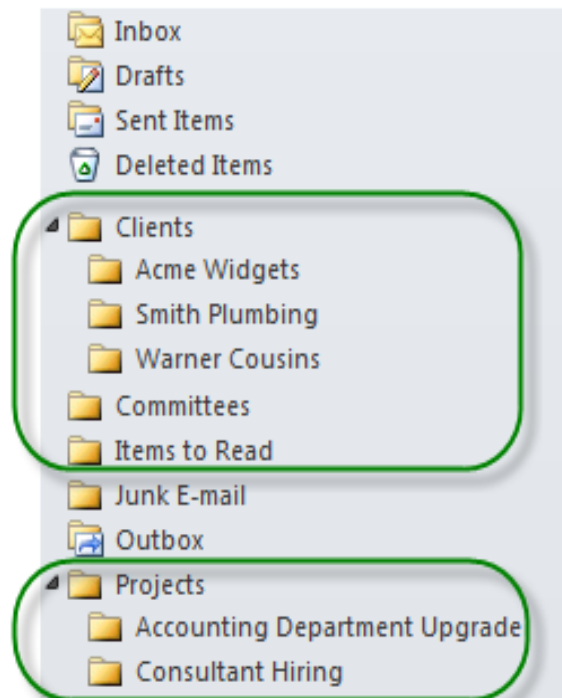
You might not have a choice about what e-mail application you use; check with your IT department if you're unsure. But if you've been longing to change applications or to perform a major upgrade, this is the time to do it.

Take Some Training

Next, learn about your e-mail program. Go on a special course; pick up a book, take a quick online training session, browse the program's help file, or have an experienced friend show you the ins and outs. You'll be surprised at what your e-mail program can do for you!

Set Up Folders

Now, set up folders just as we did on your hard drive. Here's an example from Outlook 2010:



Notice how files are consistently categorized and clearly named.

Schedule Backups and Archives

This is the time to schedule a backup of your e-mail. This can be done through the e-mail program, in the operating system, or with a separate application. Make sure that backups are stored in a separate location, like on a DVD or on a USB drive. Store them outside of your office.

Most e-mail programs also support archiving: moving all of your e-mail out of the program into a separate folder. Typically, this is done once a year. Set this up now! If your e-mail program doesn't support this, put a reminder in your calendar to do it at the end of every year.

Automate What You Can

Next, set up automation wherever possible. Some ideas:

- Set up rules to move messages from particular people or organizations.
- Microsoft Outlook features Quick Steps, which allow you to combine multiple actions into one clickable button and/or shortcut key. Take the time to learn about these, review the Quick Steps already configured, and configure your own if necessary.
- Configure your junk e-mail/spam and phishing filters to move suspicious messages out of your inbox. Be sure to review your junk mail folder periodically.
- Empty the recycle bin once a week.

Use Time-Saving Tools

Other e-mail time-saving tools that we like include:

- Dynamic search folders
- Assigning reminders and flags to e-mail messages
- Customizable alarms and reminders
- Creating calendar appointments and tasks from e-mail messages (simply drag it from your inbox onto the calendar or into the tasks folder)
- Color-coded categories
- Message grouping (by conversation, sender, or date, for example)
- Marking a message as complete to indicate that you have completed required actions
- Quick access to folders via a Favorites pane
- Customizable navigation tools
- Address lists and contact groups

If you're not sure what your e-mail can do for you, pressing F1 typically opens the help file. Take the time to look for easier, faster ways to perform common tasks.

Top Applications

In a March 2013 survey by Litmus Email Analytics, the top e-mail clients were:

- Apple products (42% of users)
- Microsoft Outlook (17% of users)
- Windows Live Mail (10%)
- Google Android (8%)

Information Management

Setting Up Your Information Management Center

Key Components of a System

Getting Started

Let's look at the ideal structure for your information center. Each component must be kept in a consistent place. For example, all tasks lists should be electronic or paper-based. However, you might have some electronic components and some paper-based components. That's OK!

Calendar

Purpose

Used to keep track of all appointments and follow-up reminders.

Format

- If paper-based, have one to two pages per day (enough room for appointments and tasks).
- If electronic, it should support reminders, color-coding, adding notes, and easy search and sorting options.

Projects Notebook

Purpose

Keep track of project ideas, "someday" items, and other miscellaneous information.

Format

- If paper-based, should have tabs from A-Z, such as a three-ring binder with index tabs.
- If electronic, it should be organized alphabetically.

Communications Log

Purpose

- Keep track of voice mails sent and returned.

- Things to mention to people you frequently communicate with.

Sections

- Voice Mail Log: One message per sheet. Be sure to include the date and time, person calling, their organization, essence of the message, callback number, and due date. Text messages can also be logged here. If necessary, move completed call sheets to a folder in your archive files. (Make sure they are organized by month.)
- Communication Log: Keep one sheet for each person that you regularly communicate with. Note things to tell them, questions to ask, items to return, etc. The next time that you see that person, grab their sheet and give them the necessary information. Then, toss the current sheet and start a new one.

Format

- If paper-based, should have section for each area, with people organized alphabetically (perhaps with index tabs).
- If electronic, it should be organized alphabetically.

To-Do List

Purpose

Keep track of things that need to be completed.

Tips and Formats

- There is a lot of debate about to-do lists. Some people swear by them, while others abhor them. If you find them useful, use them (but properly). If you don't find them useful, don't use them! Your incubator, priority tray, and calendar may be enough to keep you up to date.
- Most e-mail programs feature the ability to track tasks, monitor completion, and assign reminders. You can also get specific programs to manage tasks. We recommend using something that is integrated with your e-mail program, however.

The Running List Method

- Some people keep a running paper list, crossing off items as they are complete and adding items as they come up.
- If you choose this method, make sure you include due dates and highlight your top three tasks so you don't get overwhelmed.
- Start a fresh list periodically.

The Daily List Method

- At the *beginning of each day*, write down what you need to accomplish, based on e-mail, your incubator file, voice mail, and any other information sources.
- *During the day*, write down anything that will take more than three minutes to do. (Future tasks should be filed in your incubator, with a reminder on your calendar.) Cross off items as you complete them.

- At the *end of the day*, review uncompleted items. Start a fresh to-do list for the next day and add any items to be completed tomorrow. For future items, file them in the incubator with a reminder on your calendar.
- If you find yourself re-writing an item three days in a row, ask yourself why it isn't getting done. Do you need to delegate it? Set a deadline for it? Break it up into smaller tasks?
- This type of list works best when you have a few large tasks to accomplish each day with not much change during the day.

Case Studies

Sarah the Salesperson

Sarah is a salesperson with a high-tech firm. She loves her laptop! She uses different Microsoft Office programs as her information center.

- Microsoft Outlook handles her to-do list and calendar. She also uses Outlook's reminders to help her act on e-mails in time. She uses the Notes feature to track things to tell her colleagues and her manager.
- She has a Projects notebook set up in Microsoft OneNote, divided into different sections of the alphabet (A-E, F-J, etc.), with a page for each letter. She tracks ideas for products and services here. Then, she can present them at the quarterly brainstorming meeting.
- She uses her company's custom sales application, which integrates with Outlook, to help her manage voice mail and calls to make.

Walter the Writer

Walter is a great writer, but he's pretty old fashioned when it comes to managing his work. His three-ring binder is his lifeline! He has it organized into the following sections:

- **Calendar:** Contains standard daytimer pages with two sheets per day. He writes appointments on one sheet and tasks on another. He updates his to-do list at the beginning and end of each day. He doesn't get much voice mail; when he gets a message he adds a sheet of loose-leaf with the details.
- **Ideas:** This is his version of the Projects notebook. He has index tabs from A to Z with loose-leaf in each section. He writes down ideas for upcoming books in this area, using the topic to decide what letter it falls under. By starting a new sheet for each book, he has lots of space to track his ideas.
- **Research:** At the back of the binder, Walter has a special section for research, ideas, and notes for his current project.

Edna the Executive Assistant

Edna is an assistant to three busy executives. She uses an internal, network-based mail, calendar, and tasks program to manage their calendar and tasks. She also keeps her appointments in this program so that the executives can view her calendar and book appointments for her.

To keep track of her day-to-day items, she has a spiral notebook with two sections. She uses the first section to create a fresh to-do list each day. She uses the second section to keep a log of voice mails sent and received.

She keeps folders beside her incubator in a hanging folder rack. She has one folder for each executive, as well as other assistants, and files documents, notes, and reminders for each individual in their folder. That way, when she has a meeting with that person (or even if they stop by her desk), she can just grab their folder and cover all items at once.

Test your knowledge

In the space below, create two case studies like the ones we just presented.

Case Study One

Case Study Two

Lessons Learned

How will you manage your calendar, project ideas, communications, and tasks?

What other custom components will you need?

What changes will you need to make?

What will you take directly from our suggestions?

What will be your first step?

What will the end result look like?

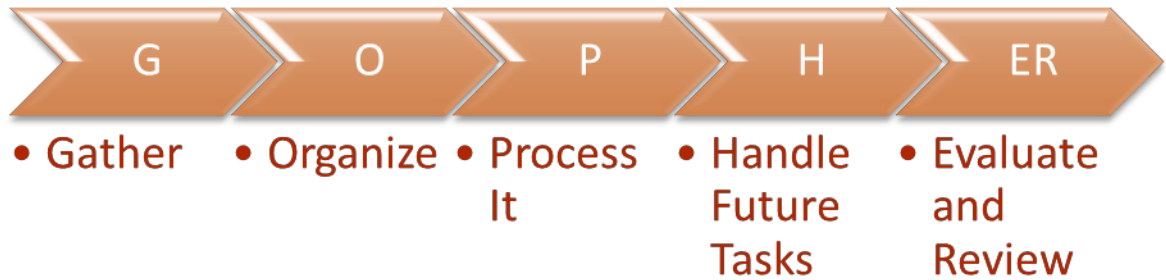
How will this change how you work?

Managing Information in Six Easy Steps

GOPHER It!

Process Overview

When you receive a piece of information, what do you do with it? GOPHER it!



G = Gather

To start, gather all the information together. Some examples:

- Download your e-mail
- Record your voice mails
- Pile all of those meeting minutes together

Handle only one type of information at a time.

O = Organize

Then, sort the information in a way that makes sense. Examples:

- Sort your e-mail by date
- Prioritize voice mails
- Organize minutes chronologically

P = Process It

Use our 3D system to identify how to handle the task.

- **Discard:** Throw out anything that you don't need.
- **Delegate:** Pass on any tasks that can or should be done by others.
- **Do:** If the task can be completed in three minutes, do it! Otherwise, set it aside for the next step.

Some examples:

- Deal with e-mails that can be handled quickly; defer or delegate others
- Return phone calls
- File or discard minutes as appropriate

H = Handle Future Tasks

Record future tasks in your to-do list, incubator, or calendar as appropriate. This is also the time to share the information with others and create reminders for preparation tasks.

ER = Evaluate and Review

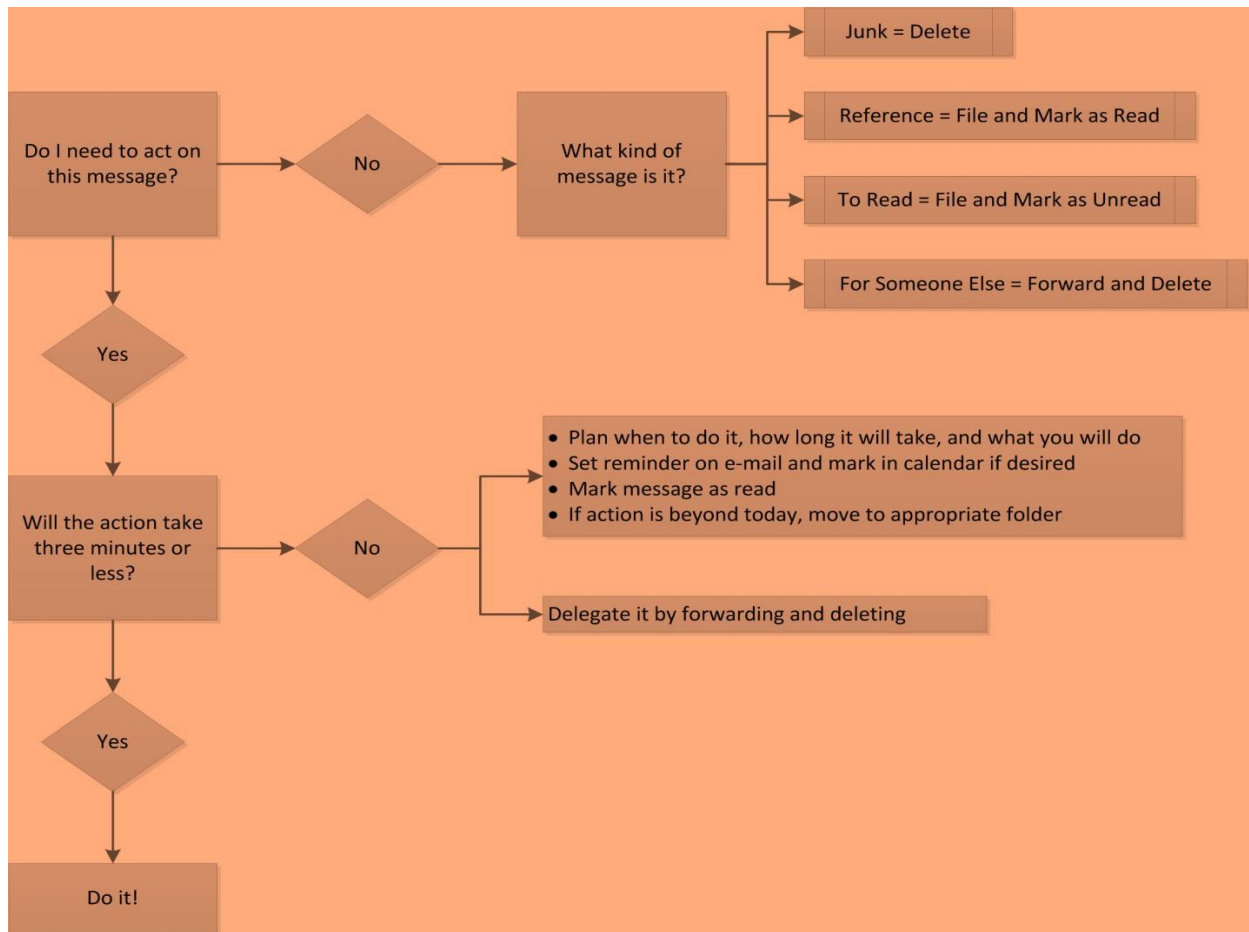
When you're all done with the item(s), ask yourself, "What else needs to be done with this information?" If there's nothing else, congratulations! Start back at the beginning and **gather** the next type of information. If there are other things to do, go back to **processing** the remaining information.

Finally, book an appointment with yourself once a week, preferably on Friday afternoon, for a **weekly review**. Complete the following tasks:

- Clear out any items that have been stuck in your priority box and/or to-do list. Identify what needs to be done with them and make a plan to do it.
- Gather and process all information: outstanding files, that pile of meeting minutes you've been avoiding, etc.
- Identify where you did well and where you could have done better. What changes do you want to make to your system? Make a plan for implementing them.
- Write down one thing that you will do next week to be even more organized and productive.
- Review your upcoming week. Record any tasks, thoughts, reminders, etc. that will help you stay on top of things.
- Congratulate yourself on a week well done!

Processing E-Mail Messages

Let's take a minute to talk about one of everyone's big challenges: e-mail. Handling e-mail can be overwhelming. Start by focusing on one e-mail, preferably the oldest item. Scan the subject line in it, and then select it and any other messages that you will handle the same way. Then use this flow chart to help you decide what to do with it. (This is basically a re-wording of the steps in the H phase of GOPHER!)



You should spend no more than 10 seconds on each message, unless it is something that you can clear out of the way right now.

Digging Donald out of the Hole

Donald has gotten a little behind in dealing with information that crosses his desk! To get started, he's made a list of problem areas.

- Three stacks of mail in different places
- 200 messages in my e-mail inbox
- Voice mail is probably overflowing; afraid to check
- Several memos sitting on the corner of my desk
- Pile of invoices from accounting to be filed
- Monthly report needs to be finished in four days; not sure where the information is or how to start
- Stack of promotional materials to be reviewed and distributed

Pick two or three of these problems and use the GOPHER plan to help dig Donald out of the hole.

Problem One: _____

G: Gather

O: Organize

P: Process

H: Handle Future Tasks

E: Evaluate

R: Review

Problem Two: _____

G: Gather

O: Organize

P: Process

H: Handle Future Tasks

E: Evaluate

R: Review

Problem Three: _____

G: Gather

O: Organize

P: Process

H: Handle Future Tasks

E: Evaluate

Prioritizing work and Routines

Prioritizing Your Tasks

The Urgent-Important Matrix

Origins of the Matrix

Former United States President Dwight Eisenhower once said, “What is important is seldom urgent and what is urgent is seldom important.” He based his time management around this idea. Other personal productivity experts, including Stephen Covey and Laura Stack, have mainstreamed this idea in recent years.

Eisenhower’s matrix is pictured on the next page. It can help us determine what’s urgent, what’s important, and most importantly, how we should be spending our time.

- **Important** is defined as an activity that will help you complete your goals.
- **Urgent** is defined as something that has a deadline attached to it.

Matrix Overview



Quadrant 1: Urgent and Important

These are the things that need to get done NOW. This is the payroll deadline, the upset client, and your income tax return. Ignoring these items will result in major disasters.

This is where many people find that their time gets eaten up. “I can’t control when clients get upset!” you might say. “Dealing with an interruption like that always throws my day off kilter.”

You’re certainly right about one thing: these situations often can’t be controlled. However, their frequency and impact can often be reduced with some good Quadrant 2 activities.

Quadrant 2: Important but Not Urgent

These are the big-picture items: the things that may not have a deadline but are crucial to your long-term success. This is where our weekly review, goal setting, and information management fits in. Time spent here is invested in yourself, in others, and in the future. Activities here should diminish the number of Quadrant 1 items, reducing stress, minimizing crises, and making you feel more in control.

Quadrant 3: Urgent but Not Important

These are the time-wasters that can suck the life out of anyone’s day. Unnecessary meetings, drop-in visitors, improperly delegated projects, and pointless reports all fall into this category.

There are a few ways to manage interruptions. We don’t recommend an open-door policy – it’s just too disruptive. But locking yourself in your office like a hermit can result in small problems spiraling out of control. Instead of one of these all-or-nothing approaches, think about using one of these techniques in your office.

Set Office Hours

Set aside specific hours in the day when your door will be open, like professors do. Make exceptions for emergencies.

Institute a Quiet Time Policy

Some organizations have successfully instituted a timeframe where employees cannot interrupt each other or schedule meetings. The best time is typically first thing in the morning or during a period of time when customers are not coming in.

Set up a Signal System

Meet with your department and agree on a signal that will indicate not to interrupt them unless it’s an emergency. Some popular ideas:

- Wearing an armband or hat
- Installing curtains across cubicle doors

- Turning your nameplate around
- Hanging a sign on the door

This system will only work if employees use it properly and don't abuse it.

Create an Information Center

If people are constantly visiting your office looking for forms, brochures, or other standard information, try hanging a file system outside your office door, clearly labeling each section, and filling it with those items. Be sure to include your contact information in case they have questions.

Quadrant 4: Not Urgent and Not Important

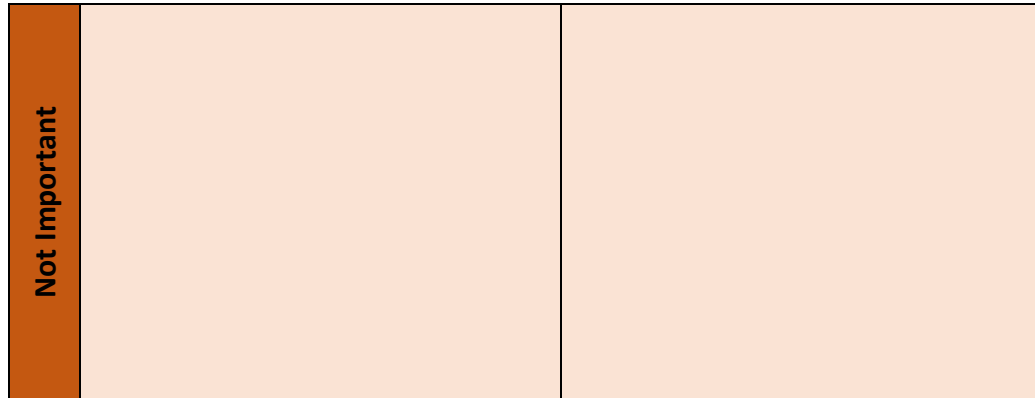
These are the activities that produce the most waste. Linger over coffee, surfing the Internet for hours, mindless TV watching, and gossiping around the lunch table are all activities that eat up our time but don't have any tangible results. Watch out for these black holes in your day! True recreation should re-energize you, not turn you into a mindless zombie.

Putting Tasks in Their Place

Let's use the urgent-important matrix to help Donald from this morning's exercise. He has made a list of the various tasks that he usually performs in a day, as well as tasks that he will be working on this week. (Today is Monday in Donald's world.) He wants to identify where he should be spending his time so that he doesn't end up in the hole again!

Place the tasks from the handout in the correct quadrant.

	Urgent	Non-Urgent
Important		



Saying No

In order to make the most of your time, you need to find ways to decline tasks that don't move you towards your goals – those Quadrant 3 tasks that can be time-wasters. However, many people find saying no very stressful.

So just how do you say no in a way that won't make you feel bad? Once you understand the request and decide you want to say no, choose the kind of no that best suits the person and situation. Here are some general rules to follow.

The simplest option is to **say no firmly and calmly**, without saying, "I'm sorry," which weakens your stand. Or, follow "no" with a straightforward explanation of what you are feeling or what you are willing to do. Examples:

- "I'm uncomfortable doing that."
- "I'm not willing to tell the customer no, but I will process the refund for you."
- "I don't want to do that."

You can also **offer a choice or alternative** with your "no," such as:

- "Not now; however, I will when I get this done, which could be in an hour."
- "I don't have time today, but I could help out first thing tomorrow morning."

Another option is to say no and **offer a compromise**. This works when you already have a lot on your plate and someone gives you a project that they feel must be completed right now. Here is an example: "I'm about halfway through that staffing report that you asked me to complete by Friday. I can pause my work on that task, and start this new project instead if you like. What would be the new deadline for the staffing project?"

Similar to this is the approach where you **say yes, and then give your reasons for not doing it or your alternative solution**. This approach is very interesting. You may want to use it in situations when you are willing to meet the request, but not at the time or in the way the other person wants it. Examples:

- “Yes, I would be willing to help you out, but I won’t have time until tomorrow afternoon.”
- “Yes, I could have part of your report typed, but not all 40 pages.”
- “Yes, I’d be willing to go along with your second alternative, but not the third one you suggested.”

Just make sure that you are ready to follow through on your promises!

You can also simply **clarify your reasons**. This does not include long-winded statements filled with excuses, justifications, and rationalizations. It’s enough that you do not want to say yes. Your clarification is given to provide the receiver more information so that he or she can better understand your position. If your message isn’t getting through, **try making an empathetic listening statement and then saying no**. Example: “I can see that it is important to you that one of my secretaries gets your report done. I’d like to have someone do it, but my staff is already overburdened with high priority tasks to be completed by the end of the day.”

You may have developed **your own style of saying no** based on your past experience and personality. If so, use it.

Creating Routines

Why Routines?

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

During high stress, routines are like ports in a storm. Top performers in every area of every industry have lives full of ritual. Routines allow you to concentrate on what’s really important. Once you set them, they save you time and energy because you won’t have to plan or think about them.

Routines include setting time with family, for eating, for sleeping, and for exercising. It means setting a clear routine or time for all necessary 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.
- By fixing mealtimes and planning in advance you'll become vastly more efficient.
- Since exercise has such a powerful effect on brain energy and alertness, place your workout at times of day you most need them.

Start of Day Routine

Here is what we suggest for a morning routine when you arrive at the office.

1. Take off your coat, deposit your belongings, and grab a cup of your favorite hot beverage in your favorite mug.
2. Take ten minutes to get your head in the game and catch up on chatter. (Then you won't be wondering how Betty's party went last night, or if Myron made up with his girlfriend.)
3. Sit at your desk. Clear the surface and the priority tray.
4. Review your incubator, tasks, and calendar for the day.
5. Process your voice mail and e-mail.
6. Prioritize your tasks.
7. Place materials for the first task in your priority tray.
8. Get started! You should try to focus on one thing at a time.

Tip: If someone rushes in with something that must be done right away, you can place your current project in the priority box, switch to the emergency task, and then go back to your project right away.

Returning from a Meeting, Lunch, or Other Interruption

When you are called away from your desk, you can use the above ritual to get your head back in the game and start working on the right thing. Simply start at Step 3.

End of Day Routine

The end of day routine looks similar.

1. Process your voice mail and e-mail.
2. Review your calendar tasks, incubator items, and priority tray items.
 - What did you accomplish?
 - What didn't get done? Why?
3. Set up your to-do list, calendar, and incubator for tomorrow.
4. Clear the surface of your desk and your priority tray.
5. Leave work.
6. Take the time on the drive home to decompress.
 - If you remember something that you forgot to log, make a note, leave yourself a voice-mail, or send yourself an e-mail.
 - If you're having a hard time letting go of a problem or task, picture it inside a balloon. Now, imagine the balloon floating away and outside of your stream of consciousness.

7. Go home and enjoy your evening!

Dealing with E-mail

In general, you should work through your inbox at the beginning and end of your day, and at regular intervals. Try to find natural work breaks to deal with e-mail. Let's say that you're working on a complex proposal. You might take an e-mail break after you've completed each section. This gives your mind a refresher and it prevents interrupting your train of thought.

You may want to set your e-mail program to only check your e-mail once every hour. Some time management experts even suggest dealing with e-mail only once or twice a day.

Stopping Procrastination Now (Not Later!)

Tackling Procrastination

Sometimes it's easier to put things off than it is to tackle them right now, especially if the task is unpleasant. You tell yourself you'll start that diet... in the morning, after this big turkey dinner. You'll tackle that messy storage room next weekend. You'll call that angry client... right after this meeting.

How do you motivate yourself to get started on these kinds of projects? How do you stop making promises and start doing? Here are a few ideas.

Identify the Reward and the Cost

Think about what it will cost you to perform the unpleasant task. Half an hour of your time? Money on new storage items? Some patience? Then, think about the benefits. Regardless of the cost, you'll feel a sense of satisfaction at getting an unpleasant task off your to-do list.

Break it into Parts

How do you eat an elephant? One bite at a time...dipped in chocolate. What does this mean? It means splitting big projects into small parts and making them more enjoyable. Perhaps playing lively music will help motivate you to clean. Or, promise yourself some other treat after each small part of the task is complete.

Five Minutes Before the Hour

Set aside five minutes at the end of each hour to work on one small part of the task. At the end of your five minute session, set a timer for 55 minutes so you'll remember the next five-minute period. What can you get done in only five minutes? Try it – you'll be surprised! This example of instant success will bring a feeling of genuine satisfaction. It might just be the motivator that you need to stop procrastinating and start doing.

A Challenge to Change

What is one activity that you are putting off right now?

Why are you putting it off?

What positive things are resulting from putting it off?

What negative things are happening as a result of delaying this task?

What could or will happen if you continue to delay this task?

What steps need to be taken to complete the task?

What will the end result look like?

What is your next step?

What do you need to do to complete this step?

When will you have this step completed by?

Who will help support you?

When will you review your plan?

Applying Our Lessons at Home

Record productivity ideas for each topic listed below.

Meals

Exercise

Fun Stuff

Children

Chores and Housework

General Organization
