



Unit 7

Personal Work Priorities & Professional Development

Learning Outcomes

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

- ✓ Learn some ways to deal with the challenges of being a manager.
- ✓ Recognize the responsibilities you have as a manager, to yourself, your team, and your organization.
- ✓ Learn key techniques to help you plan and prioritize effectively.

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Adjusting to Your Role as a Manager

A Survival Guide

Often, new managers feel that they're thrown into the deep end. They're not sure where to start or what to do first. This workshop is an excellent beginning to your new role.

However, there are four keys to surviving life as a manager – now or ten years from now.

Ask for help.

This is not the time to be a superhero and pretend that you know everything. Remember, there is no such thing as a dumb question. Ask others for advice, including your own supervisor, your colleagues, and subject matter experts. It's even OK to ask employees questions, as long as they're the most likely source of information. (For example, you wouldn't want to ask them about the company's disciplinary process, but you might want them to walk you through how they approach a particular task.)

Ask for resources.

What people and/or materials do you and your employees need to do a better job? Make a list of these items, how it would improve job performance, and how it would generate profit. Then, submit your requests in writing, and keep copies for your records. Remember, you won't receive anything if you don't ask.

Find a mentor.

Find someone that you can turn to for advice and guidance over the long haul. A seasoned supervisor is ideal, but anyone that you know and trust (and that is knowledgeable) will certainly be able to help you.

Set limits.

Learn to say, "No," to plan, to prioritize, and to manage your time and resources. This is something we'll talk about later on today.

Making Plans

Old Saws

You have probably heard these old saws many times. What do they mean to you?

A stitch in time saves nine.

He who hesitates is lost.

Paralysis by analysis.

All the plans of mice and men oft go awry.

Urgent-Important Matrix

An important part of planning is deciding what is urgent and what is important.



- **Urgent:** Failure to complete it by a certain time will conceal or reduce the benefit of doing it permanently.
- **Important:** Needs doing but either has longer timelines than urgent sometimes in the order of months or no set timeline.

Both types of tasks have a place. If we are less than adequate planners, having considered the Return Of Investment (ROI) of what we do, we tend to get stuck in firefighting mode or crisis management, where everything is urgent. This can often be prevented or reduced if more time is spent planning or anticipating and rectifying deficiencies that may lead to crisis situations.

In the past can you recall where you or your supervisor spent energy?

What quadrants had most of the energy and resources?

What activities/tasks fell into the crisis/problem matrix?

What are the routine tasks or interruptions that you faced?

What are the things you could do that would provide the greatest opportunity or pay-off?

What are the trivial activities that may cause you to waste time?

Another way tasks can be broken down is by progress or maintenance.

- **Progress Task:** You believe this task may move you towards a position which is fundamentally better than the one you are in now. These usually exist in your head, are rarely urgent, are usually new, and are often uncertain.
- **Maintenance:** These tasks do not move you forward, although they may very well keep you from falling back. We do more of these because they are obvious. They are usually urgent (such as month end financial statements), we are comfortable with them, and they are easily justifiable. These tasks tend to be safe.

Prioritizing

For each task, determine whether it is a progress or maintenance task and urgent or important. Then, determine their priority against one another.

	Maintenance/Progress	Urgent/Important	Your Ranking
You want to have lunch with your boss. (45 minutes - 1 hour)			
You were instructed the day before to prepare your equipment budget for the next twelve months. (2-3 days)			
You open up your e-mail and see 53 messages waiting for you. (1-1½ hours)			
You need to talk to one of your staff about the new computer program coming online next month. Staff training has not been scheduled and you are afraid there will be glitches that will affect clients if staff isn't trained properly.			
You have a stack of unanswered mail that has been labelled "high priority" that you feel must be attended to urgently. (1½ hours)			

You'd like to catch up on the professional journals that are piled on your desk. (1 hour)			
You need to prepare a presentation for a meeting slated for next month. (2 hours)			
There is a meeting at 2:00 p.m. for all supervisors, but you don't know what it is about.			
There is a rumour that there will be some major staff changes coming down the line that could affect your whole department.			
One of the critical employees in your department is out sick today and you must find a replacement if you are to fill an important order for a client.			

Planning

"Failing to plan is like planning to fail."

Plans are what come out of the planning process. Plans are what you intend to do in the future. Before you can develop plans, however, you must set targets – goals or objectives.

There are four elements of planning:

- **Goals:** Goals or objectives specify future conditions the planner wants to attain.
- **Actions/Strategy:** These are the preferred means, or courses of action, to reach those objectives.
- **Resources:** Time, equipment, people, etc. that are always in short supply and that put constraints on the action. These have to be considered as you set targets and develop your strategies.
- **Implementation:** Ways and means, including the assignment and direction of personnel, to carry out the intended action.

Typically, the goals you set for yourself (or that are set for you) will be a part of the company's overall objectives. They will be targets to aim for in the near future. They will pin down your department's output, quality of workmanship, and allowable expenses.

Managers often need to get work done through the efforts of others. To achieve this, they must schedule and prioritize not only their own work but set priorities and timelines for those they manage. They must organize resources to make sure plans hit their targets/goals. They must ensure people are at work on time, resources aren't wasted, equipment is in good repair and able to give their expected daily output, and that services will be of the highest quality to ensure customer satisfaction.

Setting Goals

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 to know what we want to achieve. The way we word our goals is the biggest factor in helping us achieve them. Lucky for us, some smart person has come up with an acronym to help us remember these characteristics. Goals should be SMART.

S=SPECIFIC

When we make our goals too general we aren't able to visualize them, and if we can't see them, we have a hard time devoting our efforts toward reaching them. We are more apt to do a good job of redecorating the bathroom if we have a picture in our mind of how it will look when it's done.

M=MEASURABLE

If we can't measure a goal, we have no idea how close we are getting to reaching it, and that can be demotivating. For example, say you have decided you will save some money from every pay check in order to take a vacation this summer. But if you don't set a specific amount each pay, and you don't have an amount you want to reach, you are less apt to put the money away.

A=ATTAINABLE

We sometimes think that we should set high targets or goals for ourselves, in order to grow and stretch. Well, we do want to grow and stretch, but if we set goals that aren't doable, we soon get discouraged and we stop trying. The really high achievers in the world know this. They set goals that they know they can reach, with a little stretching, and when they get there, they set another goal they know they can reach. They climb the mountain one step at a time.

R=RELEVANT

Goals have to make sense and have some importance to accomplishing some vision/mission, either yours or the company, or they will soon be discarded. Set goals that make sense to you. (Another word that is often used for the R in this acronym is Realistic.)

T=TIMED

Put a deadline on your goals. Deadlines are great for getting things done.

You will also want to make sure that your goals have the three P's.

- **Personal:** There has to be a buy-in.
- **Positive:** You won't want to work towards it if it isn't.
- **Put in writing:** Makes it more real.

Make them Personal.

You set goals because you want to reach them, not because your boss or your spouse wants you to. Similarly, when you are helping your employees set goals, they must be goals that your employees want, not the goals you want for them. Without buy-in, you are wasting your time.

Make them Positive.

We can create negative energy by saying what we aren't going to do, but the effect is more sustainable when we say what we will do.

Goals aren't just about work. You are a whole person with many more sides to you than just your skill as a manager for your organization. While you are thinking about setting goals, think about areas in which you want to set goals.

Put these goals or targets in writing.

People are often more committed to achievement of a goal if it is written out. Also you have a record of it that can be referred to whenever you need to. Everyone will remember them all the time and work towards them.

Planning Tools

Guidelines for Efficient Planning

- You can save yourself an hour a day by getting organized.
- It is important to identify and operate within two time horizons: short and long term. Anticipating events allows 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. However, detailed project plans should be developed before you make entries on your master calendar.
- 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 are excellent planning aids when properly used (explained more fully in managing projects).
- 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.
- 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, but there must be flexibility. Remember Murphy's Law: If something can go wrong, it will.

Five Point Planning Check

For every plan you make, cover all these points:

- What
- Where
- When
- How
- Who

Five Minutes before the Hour

If you have a desk or other surface that is cluttered, set aside five minutes at the end of each hour to clear off one small part of it. At the end of your five minute session, set a timer for fifty-five 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. At the end of two weeks you'll see a vast improvement. This example of instant success will bring a feeling of genuine satisfaction.

Using a Planner

What are your options?

- A calendar. Like cockroaches, calendars have stood the test of time.
- A to-do list. Someone once said, "Document what you do. Someone is sure to ask."
- A binder, with room for information, information, information.
- A computer-aided planner, with time management software.
- The digital alternative: they even talk to you!

When choosing your personal planning tool you should ask yourself these questions:

- What do you want it to do?
- How big do you want it to be?
- How much do you want to spend?

Many types of planners can work, depending on the needs of the individual. Some people want a calendar, a week at a glance, a space for a to-do list, and room for notes. Others want something so small it fits in a breast pocket.

What are the essential things to look for when you purchase a planner?

What are the key strategies for using a planner successfully?

How do you remember to call Jim next Wednesday?

How do you remember to follow up with a client in six months?

How do you remember to start a project in six weeks time?

How do you remember not to schedule an out of town meeting for your parent's 50th wedding anniversary?

Once we begin using a planner, we sometimes have a tendency to only make note of meetings we must attend or other activities that must be completed, without allotting the time required. For example, if you are attending a meeting that will take up two hours of your time, block out that two hours. Then you have a more realistic sense of how much time has been used and how much time you have remaining to use. Anything over 30 minutes should have time booked.

The To-Do Book

A to-do book is one of the simplest, most effective time management tools out there. It's easy to use, easy to carry around and easy to update and customize. To start, decide how you want to record your tasks. We recommend an elementary school style scribbler, but you can also use a computer program or a regular notepad – whatever works for you.

Next, write the date at the top of the page. Then, make a master list of everything you have to do for home or work. (We suggest that you make different lists for each.) Now, take out a highlighter and highlight the top three things that you want to accomplish. During the day, every time you complete an item, cross it off. At the end of the day, start a new page. Write the next day's date on it. Then, transfer any uncompleted items to that next page and add all the things you need to do the next day. Highlight the top two items that you want to get done. When you arrive at work the next morning, add any items that have come up, and highlight your third top priority.

Some people find that master list really intimidating. A modified approach is to lay out your week like this:

Monday	Tuesday	Wednesday	Thursday	Friday

Then, list tasks for each day in each column. (For the sake of simplicity, let's say today's Sunday, and you're planning out your week.) At the end of Monday, you'll transfer any uncompleted items to Tuesday's column and add any new tasks. At the end of the week, you'll transfer any uncompleted items to next week's list. This can also be used for teams. Take a whiteboard and turn it into a chart like the one above. Then write each team member's tasks in a different color using sticky notes or markers. (Sticky notes are useful because they allow you to easily move tasks around, rather than re-writing them.)

Setting a Ritual

How Rituals Can Help You

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. Rituals are the foundation of success. During high stress, rituals are like landing pads in a storm. Top performers in every area of every industry have lives full of ritual. Most of us have rituals in the morning. Think about your morning routine and how, if you skip it, you have a tougher time launching your day.

Rituals 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.

Before you develop your rituals, first simplify your life. 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., ask yourself if that is time truly well-spent.

Rituals include setting time with family, for eating, for sleeping, and for exercising. It means setting a clear routine or time for all routine activities. The way to get rituals 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.

Exercise - Case Study

Read the case study about Myron and answer the questions that follow.

Another Day at the Office

It was 7:20 a.m. when Myron arrived at the office. He was early because he wanted to clear the backlog of work that had been piling up on his desk. He turned on the lights and started to go through yesterday's mail. As he read the first piece, he realized he couldn't deal with it until a colleague arrived. He set it aside and went to the next. This item had potential application to a project he was working on, so he walked down the hall and made a copy for his personal use.

As he continued reading his mail he came across a journal article of particular interest and became engrossed in it. As he looked up, he was startled to find that others were arriving and it was nearly 9:00.

He quickly pushed the remaining mail to a corner of his desk and reached for a project file due tomorrow with at least two days of work yet to be completed. As he opened the file, Bill and Claire stopped by and invited him to join them for coffee. Myron decided he could spare ten minutes. Bill and Claire were both anxious to share the details of a play they attended last night. Before Myron realized it, thirty minutes had passed and he hurried back to his office.

As Myron entered his office, the phone rang. It was Mr. Wilson, his manager. There was a meeting scheduled at 10:00. Could Myron sit in for him? There was something to be discussed that the department should know about. Myron looked at his watch. There wasn't enough time to get started on the project so he pushed the file aside and vowed to start it immediately after lunch.

The afternoon wasn't any better. A few visitors, a few phone calls, a couple of letters, and then the day was over. Nothing had been accomplished on the project that was due tomorrow. As he stuffed papers into his briefcase, he wondered how Bill and Claire were able to attend plays during the evening.

Questions

- Did he make good use of his best time of day?
- Did he work on his high priority items?
- Did he have a problem saying no?
- Did he complete the tasks he started?
- Did he understand his problems?

What would you recommend for Myron?

How can a ritual help him?

What might his ritual look like?

The Four D's

Do, Dump, Delay, and Delegate

Do it Now

Do you spend a lot of time looking for things? Research tells us that the average person spends about 10% of the day looking for documents. If that were so, you could gain 5 weeks a year just by getting your retrieval methods under control!

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! 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.

Another technique is to handle the worst things first. We create more stress and anxiety, and waste more time and energy, over the things we least like to do so why not just do them?

When things feel overwhelming, parse the task into smaller steps and then start. Like the old adage says, "How

do you eat an elephant? One bite at a time.”

Dump

Get rid of things you don't need. This will take some practice and a hard-nosed approach especially if you have a tendency to hang on to stuff. If throwing it out is too difficult, give it away, or ask someone else to throw it out for you.

Delay

Occasionally we have legitimate delays, for example, if we are waiting for somebody else to get us information or complete a task. However, if you have deadlines, pass on deadlines to others as well. Don't let someone else's lack of planning short-circuit your deadlines.

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 *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 go.

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 and resources 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**.

Why do we resist delegating?

Why do we resist having others delegate to us?

What are some important things to remember when we delegate?

A Personal Action Plan

I know where I'm starting from. I know I am already good at these things, and I can do them more often:

I can learn this, I am learning this, and I am doing what I can at this stage as well. I have already learned:

I will start with small steps, especially in areas that are difficult for me. My short -term goals for improvement are:

I promise to congratulate and reward myself every time I do something, no matter how small, to maintain and improve my skills. My rewards will be:

I'm setting myself up for success by choosing long-range goals to work for gradually. My long-term goals for success are as follows:

Further Reading:

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