Planning & time management

Introduction
We all probably agree that planning to some extent is a good idea, whether for our life and career, or simply to better carry out the functions of our jobs.

The benefits can include
1. Increased ability to tackle more difficult tasks
2. Less frantic and stressed
3. Ability to take on management duties
4. Fewer mistakes and better results at work and in private life
5. Improved organisation of our own work
6. Fishing tasks with less wasted time
7. Better results
8. Greater work satisfaction
9. Higher motivation
10. Less pressure to work and succeed

A planning process
Despite these advantages, many people fail to plan. The diagram shows one process to help tackle this:

1. **Goals:** How to plan your life and career
   • The big picture, not detailed tasks

2. **Planning:** How to prepare to carry out tasks
   • How will you spend time on what rewards most / achieve results in minimum time?

3. **Decision making:** Energy, time and prospective tasks
   • How can you be effective - doing the right job right not just efficient doing any job right?

4. **Implementation:** Taking charge of your daily activities
   • How can you maximise your output on your agenda? (Avoid interruptions / distractions)

5. **Control:** Successful implementation of your plan
   • How to monitor your progress and initiate corrections

6. **Smarter working**
   • How to deal with meetings, reading, visitors, emails, telephone calls and correspondence etc

The stages are considered in more detail below.
0. Where are you now?
Before considering these stages it can be useful to assess ‘where you are now’.

Self Audit: Time and activities

<table>
<thead>
<tr>
<th>Was it necessary?</th>
<th>Completed? delegating and prioritising</th>
</tr>
</thead>
<tbody>
<tr>
<td>Was the amount of time justified?</td>
<td>Work habits, concentration, self-discipline...</td>
</tr>
<tr>
<td>Did the activity serve a purpose?</td>
<td>Executed ineffectively - planning and self rationalisation</td>
</tr>
<tr>
<td>Was the activity done at the right time?</td>
<td>Planning and organising, productivity curve, preparing</td>
</tr>
</tbody>
</table>

Self Audit: Interruptions: Think about quick fixes

| Disturbances & interruptions - the most costly / unnecessary |
| Telephone calls - Unnecessary / shorter / more effective |
| Visitors /meetings indispensable |

1. Goals: How to plan your life and career
Goal setting involves looking into the future and directing and concentrating your energy. Merely setting a goal increases the likelihood of achieving it. Personal goals are best expressed as direct, quantifiable actions but they need to be realistic and ink to your resources so some self analysis can be useful:

Establishing your goals

<table>
<thead>
<tr>
<th></th>
<th>Short (with 12 months)</th>
<th>Medium (5 years)</th>
<th>Long</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal objectives (experiences)</td>
<td></td>
<td></td>
<td>Life goals</td>
</tr>
<tr>
<td>Professional objectives</td>
<td></td>
<td></td>
<td>Career objectives. What would you like to be or become?</td>
</tr>
</tbody>
</table>

Setting objectives - (personal) goals (big picture) - vs. tasks (details).

Situation analysis
A. Your present situation personally and professionally
B. Personal balance sheet - successes and failures. Your abilities, knowledge and experience/ability (failures included so that weaknesses can be eliminated or circumstances avoided).
C. Strengths & weaknesses include:
   a. Professional knowledge and experience
   b. Social and communicative skills
   c. Leadership qualities
   d. Mental abilities and work methods
D. Ends - means analysis: are your goals (what you WANT) consistent with what you CAN DO (A, B and C). What do you need to achieve the goals and are the means available to you?

Formulating goals
Document your goals, ranking them in importance and setting target dates (with milestones where appropriate). Identify the actions to be taken.
2. Planning: How to prepare to carry out tasks

Concept: Overall time invested is reduced if sufficient time is allocated to planning.

Overall: Use time on what rewards most or achieves goals in least time. What are you going to do when?

Rules & principles
1. Organise only a certain percentage of your total working hours
2. Time frames and time waster. Build slack into your day, not each task otherwise they expand to fill the allocation
3. Unproductive tasks. Eliminate or keep to a minimum. Do you really need to do it?
4. Delegation: Decide immediately what to delegate and delegate it
5. Don't over plan - only what you can realistically accomplish
6. Flexibility - remember the time plan is there to help achieve goals
7. Analyse distractions
8. List task and activities - your to do list and your calendar, so you don't forget and have a clear overview
9. Document activities in terms of the overall goal
10. Alternatives: Consider is there a better way?
11. Priorities: Assign rankings?
12. Consistently check your time plans regularly (every day?)
13. Time Loss: try to catch up immediately, whether by working longer etc
14. Carry forward incomplete tasks or include in the next plan. Ensure easy tasks don't get tackled first.
15. Deadlines: Avoid indecision, procrastination and delays
16. Urgent. Relatively unimportant tasks can become urgent if they are not done at the appropriate time, and push aside what's really important
17. Free time: Use travelling / waiting time for networking, reading or conceptualising
18. Planning, creativity and reading. Your own personal development
19. Routine tasks: Don't forget to include in your plan
20. Variety.

Cascading of plans
Multiyear → Yearly → Quarterly → Monthly → Weekly → Daily (Realisation of the planning goal) - now just the work!

Weekly Plan
- Main focus?
- Most time consuming?
- Essentials to finish / tackle
- Routine work to accommodate
- Optional (pending) tasks to tackle
- Useful / desirable
- Unforeseen?

Benefits of written daily plan:
- avoids losing track
- Memory relief
- Motivates - clear goal
- Encourages focus and avoid distraction
- Carry forward of unfinished
- Better understanding of how long things really take
3. Decision making: Energy, time and - prospective tasks

Efficient - Doing any job right vs. Effective: Doing the right job right.

Do it daily, including prioritising. Try allocating time (60/40 rule). The benefits of setting priorities:

- Work only on important or necessary - which get finished - so no unfinished
- Work on urgent if necessary
- Focus on tasks sequentially
- Purposeful approach - time allowed
- Best reach goals
- Eliminate what you can delegate

Positive effects

- Meet deadlines
- Work more easily and achieve better results
- Improved relationships with home team
- Avoid conflict
- Avoid stress

Prioritising: the Pareto Principal: The first 20% of the time input produces 80% of the results. The remaining 80% of the time produces only 20% of the result. (In Practice: TACKLE THE ESSENTIAL FEW in preference to the peripheral many (even if they are easiest, most interesting or take least time)).

ABC analysis: Outlook has high, normal, low. (In Practice: TACKLE MOST PRODUCTIVE TASKS FIRST TO GET MOST SUCCESS FROM FEWEST ACTIVITIES)

A: 15% by number - contribute 65% to goals (on 8 hrs allocate 5 so 3.25 hrs)
B: 20% by number, 20% contribution (on 8 hours allocate 5 so 1)
C: 65% by number, 15% of total value (on 8 hours allocate 5 so 0.75)

How to allocate:

- Instrumental to main goals (Year, month, week, day)
- Any tasks contribute to several?
- What makes most difference to business’ goals
- What do I get recognised / rewarded for?
- Avoid negative reactions.

Eisenhower principle:

'Important matters are never pressing and pressing matters are seldom important'

<table>
<thead>
<tr>
<th>More important</th>
<th>B Terminate or delegate</th>
<th>A: Get on with it now!</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Important</td>
<td>Scrap!</td>
<td>C: Delegate</td>
</tr>
</tbody>
</table>

Less immediate | More immediate
Delegation:
Responsibility AND authority for means to achieve - but not leadership responsibility.

Benefits of delegation
- Manager free time for important tasks, like leadership
- Capitalises on knowledge of subordinates - do a better job
- Subordinates develop (ability)
- Subordinates motivated.

Barriers to delegation: Willing and able
- Insufficient time to explain
- Not sure what needs doing
- Quicker if I do it
- Superior asked me
- Enjoyable
- Fear a superior result
- Loss of control
- No confidence in ability
- Fear loss of authority or prestige
- Coping with resistors

How well do you delegate?

Rules of success delegation:
- Do it early
- Staff ability and capacity
- Staff motivation and development
- Complete tasks not isolated subtasks whenever possible
- Clarify whether temporary or permanent
- Similar tasks to a particular person
- Recipient willing and able
- Don't duplicate
- Delegate necessary authority
- Good instructions - covering aim and objective
- Written delegation of important / extensive
- New / complicated; prepare, explain and demonstrate, delegate then review
- Consider training
- Access to required info / facilities
- Don't unnecessarily interfere
- Be available for support
- Seek progress reports
- Monitor results and provide feedback with praise / suggestions

Six W rules of delegation:
1. What
2. Who
3. Why
4. In what way
5. with what
6. When
4. Implementation: Taking charge of your daily activities

Matching work and time

Interruptions and distractions. Working to your agenda or reacting (emails).

**Principles of organisation tips**

**Beginning**

- Positive: Fun, progress on goals, self (fitness / health). Who can I help and what problems can I tackle positively
- Fuel - food and water
- Fixed arrival time?
- Check plan - realistic? Then get on
- Co-ordinate with Secretary.
- Complete important tasks A
- Check new items

**During**

- Plan and be prepared for your work
- Adjust deadlines
- Review activities which might have unwanted repercussions
- Review so called urgent - important? Personal involvement? Delegate? Decline new 'urgents'
- Avoid unplanned impulsive activities. Note ideas for later.
- Take breaks. Get fresh air
- Mass produce routine tasks
- Stick with a task till completion -. Avoids getting back up to speed and enhances creativity / problem solving.
- Never do nothing
- In scheduling think about when interruptions occur and be countercyclical.
- Establish a 'DND' hour
- Review progress after half time allocated to a task (call/ meeting etc)

**End**

- Finish odd jobs (avoid later re familiarisation)
- Monitor results and self
- Plan next day
- Positive mood on departure
- Reflect on positives and organise high points

**Daily Rhythm**

Recognise yours: most 10am peak, dip for lunch and minor uplift late pm. Do 'A' tasks then.

Car production lines run slower at night

Work with not against your personal productivity curve.
Your personal work style
Be aware of your strengths (consolidate) and weaknesses (work on).

Work habit evaluation checklist

<table>
<thead>
<tr>
<th>Time waster</th>
<th>Possible cause</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>No goals, priorities or plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Too many things at once</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indecision</td>
<td></td>
<td></td>
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<tr>
<td>Haste, impatience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inability to say no</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tasks unfinished</td>
<td></td>
<td></td>
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<tr>
<td>Disorganised</td>
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Freeing up time
Stop - go for each task: Why, Why me, Why now, why in this form. (Post it note).

Your daily organiser
Can you use outlook or other software to hep you do this?

5. Control: Successful implementation of your plan

Functions
Monitoring results, comparing expected and actual results, initiate corrections to achieve goal. Promotes improvement in self management process.

Ongoing review several times each day
- Necessary and worthwhile
- Tackling in order of priority
- Finishing within time allocated
- Delegating enough, even pressing
- Grouping similar - production
- Fighting interruptions and time waster

Time and activities analysis
The process in 'Where are you now?'

Interruptions analysis
Again, the process in 'Where are you now?'
Controlling results
Regular monitoring of yearly, monthly, weekly and daily plans.
Do early to be able to make corrections.
For complex tasks make a control list and transfer to time planner.

Looking back on day
Not just results of tasks but also your personal situation. Usually comes down to

- **Experience**: Career building experiences or insights
- **Goals**: What did I achieve
- **Advice**: Help others / make them happy
- **Mental**: predominant mood
- **Physical**: Condition and what done for health?

6. Smart working
Process all tasks and information with your career and personal goals in mind.
50% of information is superfluous - but which half?

Efficient reading
Before: What's of significant interest re personal career goals? Table of contents
During: Improve reading methods, reduce bad habits and interference factors
After: marking
The SQ3R and SQ5R methods

Efficient meetings

Visitors (1:1)

Telephone

Correspondence
Checklists and standardised forms.