Task & Time Management

LEARNING LAB

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a *nourishing* professional life

Table of Contents

Course Description

Task & Time Management Learning Lab

In the modern workplace, there's always "too much to do and not enough time." If you want to achieve professional success, you must learn how to manage it all without causing undue stress on yourself or others. Unfortunately, effective time management is more complicated than most people realize. It requires a special set of tools and skills that must be adapted to meet the individual's needs. This session will explore 7 essential topics related to task and time management, and will provide guidance for creating your own personalized systems.

In this Learning Lab, participants will learn:

- How to assess your own time management capabilities and identify areas for improvement
- How to use efficiency audits to identify micro and macro trends—plus, how to use that information to define reasonable expectations and optimize productivity
- Strategies to effectively capture and clarify tasks and prioritize competing demands
- Tools for tracking routine tasks and follow-up activities to ensure nothing falls through the cracks

As a participant, you will be working on managing your own task list during the structured activities.

Program Pre-Work

Prior to our live event, please take a few moments to complete the following activities.

☐ Please join our PRIVATE group on LinkedIn. This is for Learning Lab participants only.

- Access the group here: https://www.linkedin.com/groups/8930280/
- Submit a request to join.
- Once you are approved to join the group, find the welcome message for your group (it will say the name of the Learning Lab and the date of the event). Please introduce yourself in the comments.

☐ Complete the Personal Assessment Tool and evaluation on pages 7-14.

☐ Complete the Personal Exploration Questions on pages 15-16.

☐ In 2020, I hosted a webinar called, "Time & the Mind." If you missed it, please make a point to watch the replay. The video will be available for you at no cost here: https://eatyourcareer.com/time-and-the-mind-webinar-replay/

While it is not mandatory that you watch the replay prior to the Learning Lab, it will certainly provide some valuable context ahead of time, and I think you'll enjoy it! You can also watch it after the Learning Lab if that works better for your schedule.

PRE-WORK: Personal Assessment Tool

This tool will help to increase your self-awareness regarding your task & time management strengths and weaknesses. All of the topics we are covering in this program can be directly linked to behaviors and results, many of which are listed below. As you review each one, circle the number in the column that best represents how often the statement is true for you. Then, follow the instructions at the end of the assessment to evaluate your results.

	Always	Frequently	Seldom	Never
System 1: Capturing & Clarifying				
I know everything I need to do and what deadlines I have committed to	4	3	2	1
I complete tasks on time	4	3	2	1
I use systems to remind me of my commitments	4	3	2	1
I do not let tasks “slip through the cracks”	4	3	2	1
System 2: Estimating & Tracking				
I know how long common tasks typically take to complete	4	3	2	1
I can estimate how long unfamiliar items will take to complete with reasonable accuracy	4	3	2	1
I understand my own natural productivity rhythms and do my best to accommodate my needs	4	3	2	1

	Always	Frequently	Seldom	Never
I know where I tend to waste time most often and am careful to manage my behaviors	4	3	2	1
System 3: Following Up				
When my tasks are dependent on future events, I have a reliable way of ensuring I remember to do them	4	3	2	1
When tasks do not have a due date or have a flexible due date, I have a reliable way of knowing when to do them	4	3	2	1
I am the one who reminds people of things we've discussed in the past—not the other way around	4	3	2	1
I have systems in place to remind me of "open loops" that I need to check on in the future	4	3	2	1
System 4: Prioritizing				
I evaluate to-do items holistically to determine appropriate priorities	4	3	2	1
I am intentional regarding the order in which I complete tasks	4	3	2	1
I understand my priorities well enough to know when expectations are unrealistic	4	3	2	1
I know the difference between importance and urgency, and I evaluate my workload based on these characteristics	4	3	2	1

	Always	Frequently	Seldom	Never
I think through the consequences of my decisions and try to minimize negative ripple impacts	4	3	2	1
My team and I have a clear, agreed upon vocabulary for discussing priorities	4	3	2	1
System 5: Scheduling				
I am on time to scheduled meetings and appointments (I don't miss them)	4	3	2	1
I optimize the calendar to ensure I'm not wasting my time	4	3	2	1
I optimize the calendar to leverage my known productivity patterns	4	3	2	1
System 6: Managing Routine Tasks				
For routine tasks, I utilize templates and checklists to prevent recreating the wheel	4	3	2	1
I have a reliable way of remembering how and when I need to do recurring tasks—even if a lot of time passes between occurrences	4	3	2	1
I have systems to remind me of recurring tasks that take place at different intervals (quarterly, annually, etc.)	4	3	2	1

	Always	Frequently	Seldom	Never
System 7: Reflecting				
I spend structured time each week planning the future, reviewing the past and organizing my work	4	3	2	1
I feel “on top” of everything, even when there’s a lot going on	4	3	2	1
I have a clear understanding of what’s coming up in the future and what I need to do to prepare	4	3	2	1
I continuously take note of my accomplishments so I can effectively speak about them spontaneously	4	3	2	1
Pre-Requisite 1: Managing Space				
I maintain a clean and organized workspace that supports my productivity and doesn’t detract from it	4	3	2	1
I appropriately manage paperwork so it doesn’t pile up	4	3	2	1
I am able to quickly find things I need when I need them	4	3	2	1
I keep an orderly electronic workspace	4	3	2	1

	Always	Frequently	Seldom	Never
Pre-Requisite 2: Understanding the Job				
I have clarity regarding my *most important* job responsibilities and goals	4	3	2	1
I know exactly what is expected of me in my role	4	3	2	1
I know what my Key Performance Indicators are	4	3	2	1
Pre-Requisite 3: Communicating				
I feel comfortable renegotiating requests and pushing back on unrealistic expectations when needed	4	3	2	1
I am comfortable asking for the information I need to get the job done	4	3	2	1
I comfortably and confidently set boundaries when needed	4	3	2	1
I ask for help managing my workload when needed	4	3	2	1
Bonus: Managing Email				
Messages do not pile up in my email inbox; I am regularly able to get it totally empty	4	3	2	1
I do not miss important email messages	4	3	2	1

	Always	Frequently	Seldom	Never
Bonus: Processing Tasks				
I delegate appropriately	4	3	2	1
I continuously look for ways to streamline my work and make myself more efficient	4	3	2	1
I have productive habits that help keep me on track throughout the week	4	3	2	1
I am able to focus throughout the day and manage distractions/interruptions effectively	4	3	2	1

NOTE: Do not let this assessment overwhelm or worry you!

If you are not sure what these things mean or how you would do these things, that's what we're going to discuss. The purpose of this activity is to get you *started* thinking about your current time management practices and systems (or lack thereof) so you know where to focus your energy in class and after.

Now that you've completed the assessment, follow these steps:

- First, add up your total for each section and write that number in the first empty column below
- Then, divide by the number in the next column over
- Then, write your result in the last column
- This gives you an average for each section, so you can compare the numbers objectively

Section	Your Total for this Section	Divide By…	Your Result
System 1: Capturing & Clarifying		4	
System 2: Estimating & Tracking		4	
System 3: Following Up		4	
System 4: Prioritizing		6	
System 5: Scheduling		3	
System 6: Managing Routine Tasks		3	
System 7: Reflecting		4	
Pre-Requisite 1: Managing Space		4	
Pre-Requisite 2: Understanding the Job		3	
Pre-Requisite 3: Communicating		4	
Bonus: Managing Email		2	
Bonus: Processing Tasks		4	

Continue to the next page for further instructions.

Based on your *new total* in the last column, which sections are your strongest (highest numbers) and which sections are your weakest (lowest numbers)?

My Strongest Areas	My Weakest Areas

Looking at your strongest areas, what makes you successful with these things? What strategies do you use and how have you become so proficient?

Looking at your weakest areas, what are the biggest challenges you experience with these things? Why do you think you struggle in these areas?

PRE-WORK: Personal Exploration Questions

These questions will help set you up for a successful and productive Learning Lab experience. If you aren't sure of the answers right now, just make a note of what you think. There's no pressure to be "right."

Where do you currently receive tasks from? (For example, do you get them verbally assigned from different people, are they sent via email, are they assigned through an electronic system, etc.)

How do you currently capture tasks? (e.g. post-it notes, notebooks, Outlook task list, etc.) How well is that working for you?

Do you have access to an electronic task or project management system (even if you don't currently use it)? If so, what system is it? If you're not using it right now, why not?

What are your MOST IMPORTANT tasks? For example, what things are always at the top of your list and, if you didn't complete them on time, would cause major trouble for you?

How is your performance measured? What are you Key Performance Indicators?

What are your biggest challenges, concerns, and questions about task and time management? What specifically do you want to gain from attending this course?

NOTE: If you have a particularly complicated question or challenge you want me to address during the training, please email it to Chrissy@EatYourCareer.com ahead of time. You will have the opportunity to ask questions during the session as well, but this can help save time and ensure I'm prepared to adequately support you.

END PRE-WORK

Congratulations, you're done (for now)!
Please wait for the live event to move forward in the materials.

REMINDER

Please be prepared to work on your own task management processes during the Learning Lab. This course is not just about "theoretical" information; it's also about real-world application!

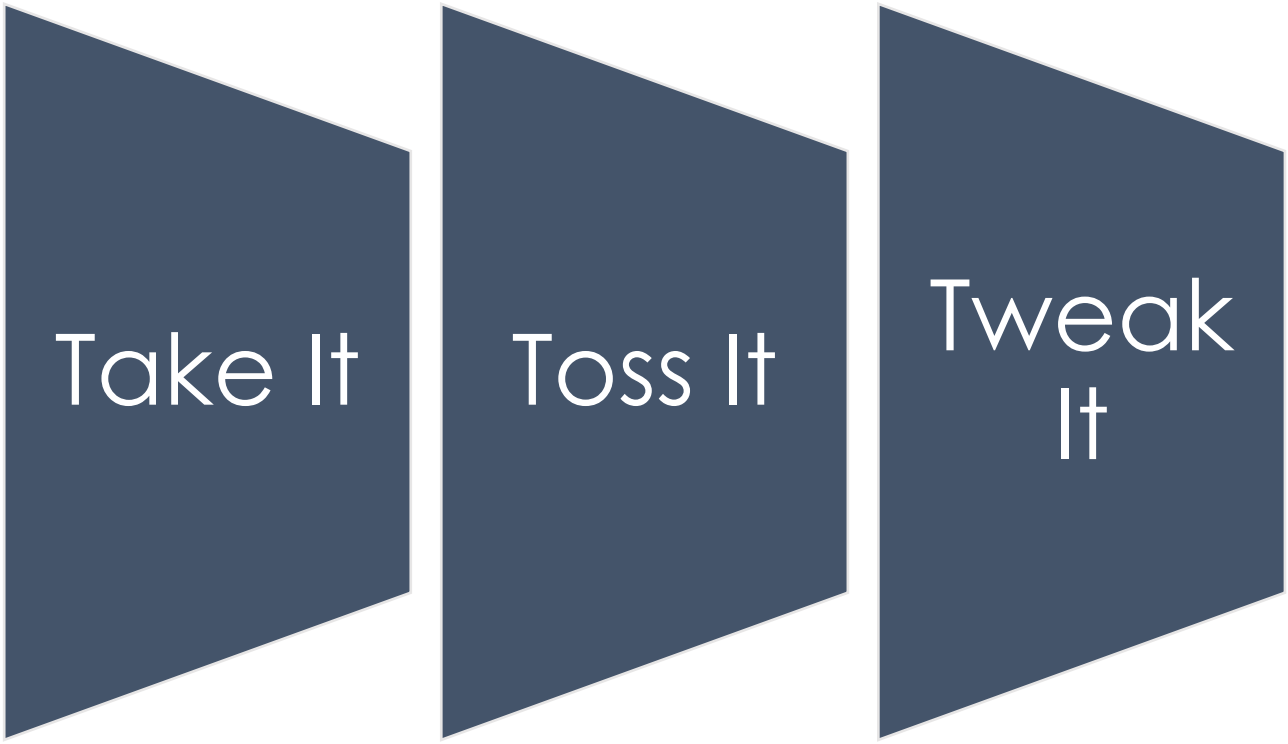
Introduction

Your Unique Needs

Task and Time Management is a highly personalized area of study. Each person has different needs based on his or her role and responsibilities in the workplace, and personal preferences. What works for one person is not guaranteed to work for another. There is, unfortunately, no one-size-fits-all solution.

However, there are some tried and true best practices. These are things that work for *the majority of people the majority of the time*. They are (mostly) universally applicable, and these are the things we will focus on in this program.

As in all training programs, you have options for how you use the materials offered.



"The best way to get a good idea is to get a LOT of ideas."

LINUS PAULING

Important Terms

Management vs. Processing

- **Management**: The process of planning and organizing your activities

- **Processing**: The execution of your activities

This session is primarily about the *management* of your time and tasks, rather than the physical *processing*. However, you will find some strategies to improve your processing skills on pages 92 and 93 of the Appendix.

Task vs. Project

- **Task**: A one-step act of forward movement; can generally be completed by one person in one period of time; often operational in nature.

- **Project**: A temporary endeavor designed to accomplish a specific goal.

Some of your tasks will be associated with projects. Some tasks will be "one-offs" and some will be of a more ongoing/operational nature. For example:

- "Purchase airline ticket to Paris" is one task in a bigger project of planning a trip to France.

- "Complete the weekly sales report" is an ongoing/operational task that is not associated with a specific project, but rather is a measurement tool your boss uses to track sales numbers. HE might use the information in it to support a sales initiative (a project) but your task is not directly related to that.

NOTE: Project Management Learning Lab

Because projects and tasks differ, the process for managing them differs too. Project Management is a unique and robust field of study. In today's Learning Lab, we will NOT cover the steps to manage a project from start to finish. That is covered in the **Project Management Learning Lab**.

Today's course is focused on tasks. Yes, a project is really just a series of interconnected tasks, so the strategies we talk about today DO apply to tasks *within* a project. But the process of managing a project (and defining those tasks contained within it) is a different process.

You can learn more about the Project Management Learning Lab and register for the next session by visiting https://eatyourcareer.com/the-learning-lab.

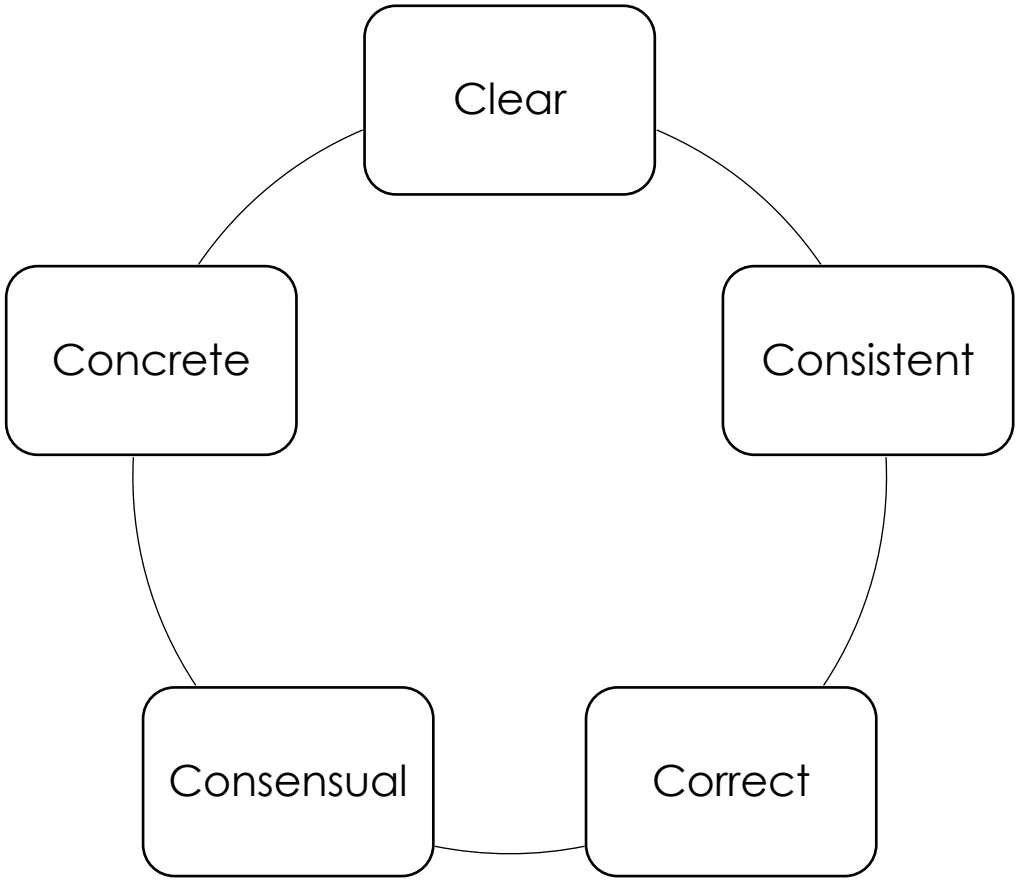
ONE MORE NOTE: You will also receive an Alumni discount code (after completing today's course) so please wait to sign up so you can use that!

Systems

A “system” (as we are using it) is an established, intentional way of doing something.

The systems we are discussing here are applicable to all (or nearly all) people working in a professional environment. But they are not, necessarily, the only systems you will need. They are the ones I deem most essential. However, you may use a variety of additional systems for doing different parts of your job.

An effective system has 5 characteristics:



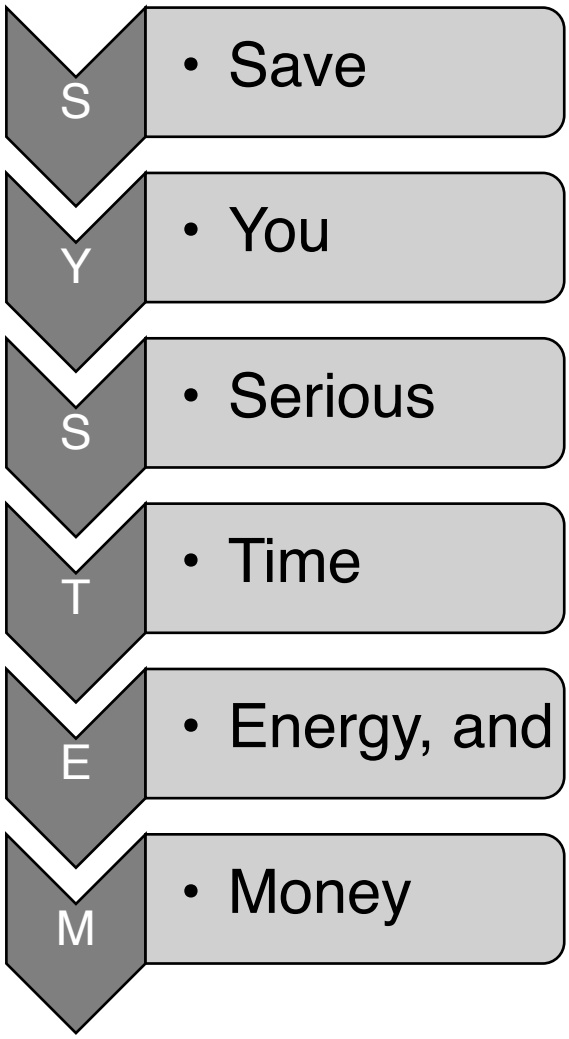
The Benefits of Systems

Systems have a number of positive benefits, including but not limited to the following:

1. They reduce cognitive load, which makes work less mentally demanding

2. They reduce decision fatigue—the tendency for the quality of our decisions to deteriorate over time

3. They increase capacity for dealing with the unexpected



"Losers have goals, winners have systems."

SCOTT ADAMS, CREATOR OF DILBERT

Put more eloquently: Goals need systems, and goals should dictate the systems you create.

The Evolution of a System

Systems are not meant to be chiseled in stone. They often evolve and go through many iterations before they feel "solid." However, the only way to know if a system works is to use it consistently for a period of time, then evaluate it. Do not give up right at the very beginning because it isn't perfect. The more you use it, the more you will see what needs to be changed to improve it. Aim for progress over perfection.

The 7 Essential Systems of Task & Time Management

1. Capturing & Clarifying	A system for collecting everything you need to do, including important details such as deadlines.
2. Estimating & Tracking	A system for refining your understanding of how long things take and your own productivity patterns.
3. Following Up	A system to remind you that a task needs to be completed even when there's no firm due date or when the due date is dependent upon something (or someone) else.
4. Prioritizing	A system to determine the correct order in which to complete your tasks.
5. Scheduling	A system to remind you of time-based tasks (events).
6. Managing Routine Tasks	A system to track and organize tasks that are done on a repeating schedule.
7. Reflecting	A system to review and reset on a regular basis.

How the Systems Work

These 7 systems work together to make you more efficient and more effective. One individual system on its own is not enough; true productivity comes from a robust, complete network of systems that support one another.

The Prerequisites

A prerequisite is defined as: “A required prior condition for something else to happen or exist.” In order to manage your time and tasks effectively, you must already be adept at the following three things.

Pre-Requisite 1: Managing Space

I have long promoted for the power of organization in perception management. Numerous studies have proven that people judge us, in part, by our environment. In the workplace, your physical space is seen as a direct reflection on you as a person and as a professional (for better or worse).

But what does space management have to do with managing your tasks and time? Simply put, there is a direct correlation:

- When your workspace is organized, your mind is organized; you’re able to think clearly.
- When your workspace is cluttered and dysfunctional, your mind is cluttered and dysfunctional; you struggle to focus.

Additionally, there are physical factors to consider. A messy desk can literally slow your ability to produce. Lost or misplaced items, including critical paperwork and information, can waste precious hours and energy as you attempt to find or replace those items or minimize the damage caused by their absence.

While it is outside of the scope of this Learning Lab to dive deep into organization strategies, you will find some additional resources in the Appendix, just in case you are struggling in this area. The materials on pages 84-92 cover techniques to help you manage your physical space, your paper, and your virtual space.

> "Working clean isn't just about cleanliness, order or minimalism. It is about practicing values. What are your standards? What habits make you successful? How strongly are you willing to hold on to your regiment of good habits in a world that will tempt you to ditch them, often without any immediate consequence? How much are you willing to keep your own focus despite the chaos around you?"
>
> DAN CHARNAS, *Work Clean*

Pre-Requisite 2: Understanding the Job

In order to effectively manage your tasks and time, you must first have clarity regarding *what* your tasks are (your duties and responsibilities) and how your time is best used (your goals and performance metrics). These things, collectively, define the job you are paid to do. This information provides invaluable context for all decision-making—which is the essence of time management.

Consider the following questions:

- What are your most important duties and responsibilities? (Consult your job description and update it if it doesn't currently match reality)
- What are your goals? (i.e. the results you are responsible for achieving)
- How is your performance (success or failure) measured?

If you do not know exactly what is expected of you in the workplace, it's time to have a conversation with your manager. Even if you think you know the answer to these questions, it never hurts to open the discussion and make sure you're on the same page. You may discover something important you've been missing. Also, if you're in a role that changes frequently or is continually evolving, you may need to have these kinds of "expectations setting" discussions on a regular basis.

Pre-Requisite 3: Communicating Effectively

As surprising as it may be, communication is an essential piece of time management in today's modern workplace. Your work is not just about you; it generally involves other people. In order to manage your time well, you must communicate effectively. This involves knowing how to:

- Ask questions to get the information you need
- Negotiate expectations
- Motivate and "persuade" people to do things
- Diplomatically push back on unrealistic demands
- And much more

If you do not feel especially confident in this area, this Learning Lab offers some specific communication strategies to support your time management efforts. However, you may have deeper work to do outside of this training. I recommend the following series of books by the authors Kerry Patterson, Joseph Grenny, Ron McMillan, and Al Switzler:

- Crucial Conversations: Tools for Talking When Stakes Are High
- Crucial Accountability: Tools for Resolving Violated Expectations, Broken Commitments and Bad Behavior
- Influencer: The New Science of Leading Change

All of these books are available at Amazon and other popular retailers.

System 1: Capturing & Clarifying

A system for collecting everything you have to do, including important details such as deadlines.

The problem:

- You believe the big lie: "I'll remember that!"
- You have random notes distributed in multiple locations
- Tasks/requests are coming at you fast and furious all day long from all directions

The result:

- Tasks get forgotten and lost
- Deadlines get missed
- Without knowing everything on your plate, you can't effectively prioritize or manage expectations
- Lots of stress!

The solution: Use a system for capturing and clarifying!

An Inconvenient Truth

Your brain is not designed for storing information; it is designed for processing information. The more you try to store, the less capacity it has for processing.

"Your mind is for having ideas, not holding them."
DAVID ALLEN, *Getting Things Done*

Primary Principles

The ultimate goal is to build a complete, permanent, centralized hub where ALL of your tasks and deadlines are stored.

1. **Capture EVERYTHING**
   - You can use "temporary" capture tools throughout the day, such as post-it notes, a notebook, the notes app on your phone, etc.
     - A work journal can act as an easy temporary capture tool. This helps to centralize things a bit. Keep it open on your desk and use that as your primary "scribble spot" throughout the day.
   - Never go anywhere without pen and paper—this includes walking to the breakroom! You never know when someone will through a task at you!

2. **Use one location to store EVERYTHING (this is your "Master" To-Do List)**
   - At the end of each day, transfer any to-do items that are in a temporary holding spot to your one permanent holding spot.
   - Also at the end of the day, mark off anything that has been completed.
   - The Master List is different from a "Daily" To Do List. I recommend you still use one, but it should only hold the things that need your immediate attention today. The Master List can be overwhelming to run your day by. (A fully functional Master List typically holds hundreds of tasks!)

3. **Capture WHAT needs to be done and by WHEN (at a minimum)**
   - Depending on the tool you are using for your Master List, you may be able to add more information (such as "start" date vs. "due" date, related tasks, comments/info you'll need, etc.). But this is not necessary.

4. Capture ACTIONS, not projects

- Everything on your Master List should be a single task (one-step act of forward movement). For example, do not put "Get PMP Certification" on your list as this takes multiple steps to complete. Instead you could put: "Research requirements for PMP Certification" or "Register for PMP prep course."

5. Categorize or group things together with other similar items

- Create categories or groups that makes sense for your world. Consider the context of the task and the "type" of work involved. Look for things that are generally alike.
- Some tasks will naturally group together by project.

Some categories that I use are: Admin Work, Client Work, EYC Webinars, Marketing, Writing, Website Maintenance, Products, Personal. (This is not an exhaustive list.) These groupings help me organize my workload and better understand how much is on my plate in each area. You can get as granular as you want with your categories.

Other categories that may apply for you include:

- Bookkeeping
- Communications
- Data Entry
- Meeting Materials
- Organization
- Phone Calls
- Presentations
- Purchases
- Reporting
- Scheduling
- Travel Planning

Understanding Your Categories

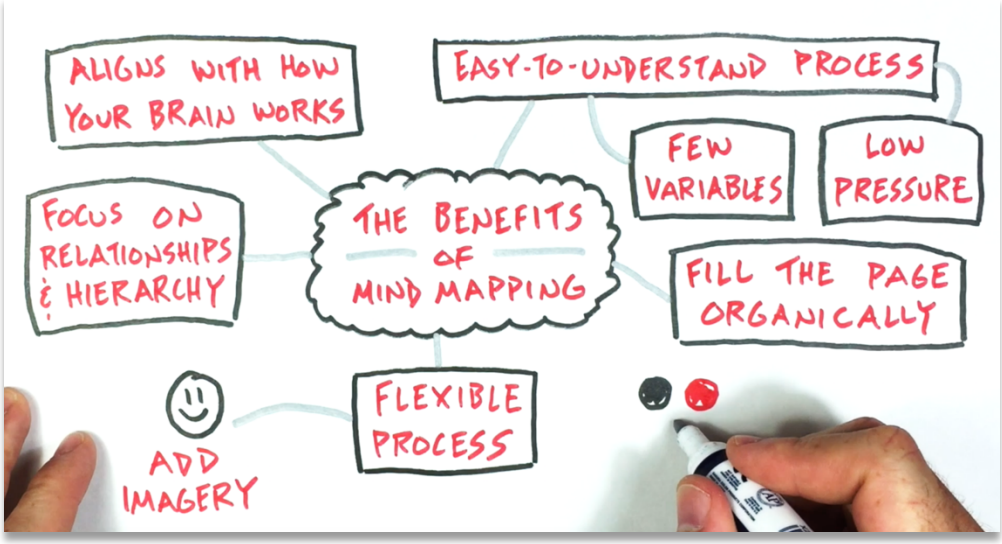
Categories are groups of tasks that “go together.” They are either similar in nature or they belong to the same project.

Having clarity regarding your task categories helps you to:

- Quickly organize your work
- Utilize tech systems with ease
- See the composition of your workload at-a-glance
- Estimate time required more accurately
- Identify efficiencies

Mind Mapping

A mind map is a non-linear, graphical diagram that depicts ideas and concepts and how they are interconnected. It is a highly intuitive way of brainstorming on paper because it aligns with the natural “web” of human thinking. When considering the categories of your tasks, mind mapping can be an especially useful tool.



Tools for Capturing Tasks

Following sound principles, as described here, is far more important than the tool you use. Any tool can work, as long as you're using the principles.

Some people prefer paper (analog) tools, while other people prefer digital tools, and yet others find a hybrid approach works best for them. Any option can work—*provided you consistently use your tools!* Likewise, any option will fail you if you fail to use it consistently.

Due to the size of the Master List (for most people), I strongly recommend that you use an electronic tool for managing it. Some of the benefits include:

- A digital tool is safer than paper. You can't lose it. If you're using a SaaS system or saving your work to the cloud, you can sync your list across devices and access it from anywhere. You can't "lose" it like you can a notebook.

- A digital tool makes it much easier to reorganize and modify what's on your list. With a paper system, you have to re-write things, which wastes time and increases the likelihood of things getting mixed up.

- A digital tool can track things forever, even when they're "done." It's not like a notebook which may eventually get thrown away or misplaced.

- A digital tool can automatically remind you of things! Paper can't send you an email notification to let you know that a task is due tomorrow. But a digital system can.

You don't need an especially sophisticated electronic system. In fact, you can manage just fine using Word or Excel (Excel is usually a better option because it allows for easy

data manipulation using features like sorting, filters, etc.) in combination with Outlook for reminders.

There are, of course, plenty of other software options as well. Some are specifically for managing tasks (which are generally more simple), while others are focused on managing projects (which are generally more complex).

Depending on the tool you select, you may be forced to organize your to-do items in certain ways. For the most part, these “limitations” are designed to improve the functionality of the system. Sometimes, you may have the freedom to do things that aren’t necessarily helpful to the overall organization of your items, so you’ll have to create appropriate limits for yourself.

For example, my tool (Asana), allows me to create tasks that are NOT connected to a specific project. However, these items all get lumped together into a group called “No Project,” which can become unwieldy if I’m not careful. Therefore, I try to make sure all of my tasks are associated with a project. Some systems will actually force you to do this.

Because this sort of linking between task and project is a best practice, I have grouped ongoing operational tasks together and called them a “project,” even though they don’t technically qualify as a project by definition. My monthly task to “Update QuickBooks” is found under a project called “Financial” along with other tasks that are financial in nature. I can also tag individual tasks, which helps to organize them with even more granularly.

It usually takes some time to figure out how the system works and how to best organize your items. Take your time learning the features of your tool and don’t be afraid to reorganize if needed. Remember that the time you invest getting it right up-front will dramatically reduce the amount of time required for managing your system later on.

General Best Practices for ANY Task/Project Management System

When you get started using a tech tool for task and/or project management, you may wish to create consistent procedures for yourself to ensure you're keeping the system as organized as possible. You may also want to consider sharing these procedures with anyone else who uses the system. Remember: "Garbage in, garbage out."

- Always connect a task to a project (or "group").

- Always assign every item to a person.

- Always include a due date on each item, even if it's not connected to any "real" deadline. Without a due date, items will get lost. With a due date, you will at least be reminded to look at it. You can always change the date at any point.

- Utilize as many features as you reasonably can (categories, colors, icons, tags, custom fields, etc.) to organize things. The more you use them, the easier/faster it will be to find things.

- Try to keep notes about tasks and projects inside the system (rather than going back and forth on email). That way, all information is contained in one place, organized and connected to the specific item it references.

- Keep the system as up-to-date as possible. As soon as it gets out-of-date, it is of no use. In fact, it actually becomes a hinderance to your productivity. You then have to go back and play catch up to align the system with your current reality.

Popular Task & Project Management Systems

Name	URL
Microsoft To Do / Teams / OneNote / Outlook, etc.	MS Office 365
Asana	https://asana.com/
Basecamp	https://basecamp.com/
Evernote	https://evernote.com/
Google Tasks	G Suite
Monday.com	https://monday.com/
Notion	https://www.notion.so/
OmniFocus	https://www.omnigroup.com/omnifocus
SmartSheet	https://www.smartsheet.com/
Teamwork	https://www.teamwork.com/
Todoist	https://todoist.com/
ToodleDo	https://www.toodledo.com/
Trello	https://trello.com
Workflowy	https://workflowy.com/
Wrike	https://www.wrike.com/

Email Management

Most professionals receive tasks via email on a regular basis (often to an overwhelming degree). Your email inbox should be treated as *temporary* capture point—just like the physical mailbox at your home; it is not a permanent storage location. You wouldn't walk to your mailbox, open it up, read a letter, then put it back in your mailbox, would you? Of course not! It doesn't belong there permanently.

Consequently, you must routinely move items out of your email inbox and into your permanent storage locations, like your archives or your Master To-Do List system. The longer something sits in your email, the more likely it is to be forgotten or overlooked because, as new messages come in, old ones get buried.

If you're used to using your email inbox like a filing cabinet or a to-do list, it's time to revise your system.

The goal, and the biggest key to success, in any email management system is this: Every message requires that you make a decision, ideally the first time you read it.

The email processing system I recommend is based on a hybrid of best practices promoted by Merlin Mann (Inbox Zero) and Charlie Gilkey (Email Triage). The steps are described on the next page and also outlined in a visual graphic on the page after that.

The general best practice is to check email frequently (not compulsively) at pre-determined intervals throughout the day.

Steps for Processing Email

1. Read the email.

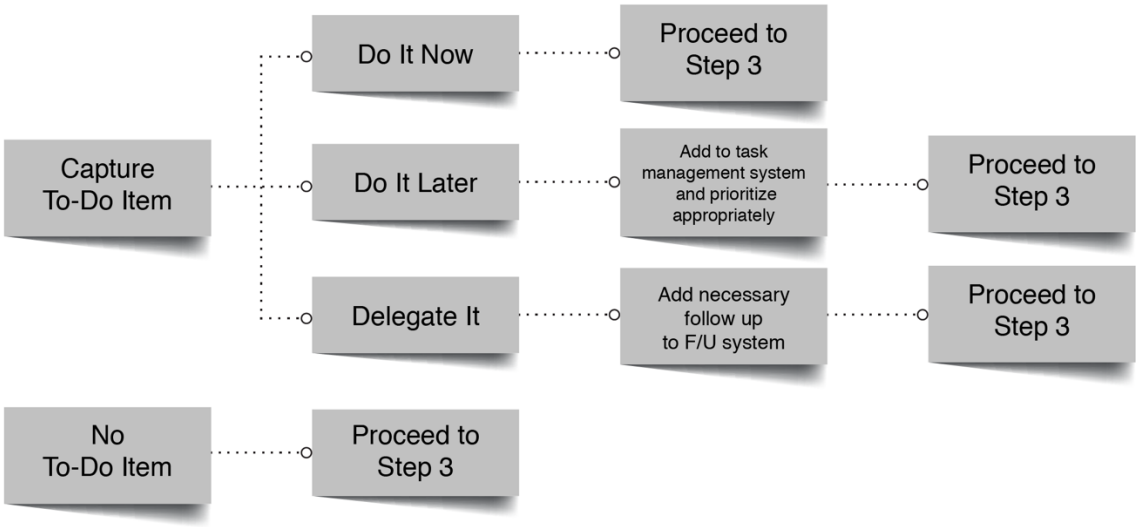
2. Determine if the message contains a to-do item.
    a. If no: Proceed to step 3.
    b. If yes: Determine whether you will do it now, do it later, or delegate it to someone else.
        i. If you choose to do it now, do it and then proceed to step 3.
        ii. If you choose to do it later, add the task to your task management system (Master To-Do List) and prioritize it appropriately. Then proceed to step 3.
        iii. If you choose to delegate it, forward it to the appropriate person and add any necessary follow up to your follow up system (we'll discuss this more later). Then proceed to step 3.

3. Determine if the message requires a response.
    a. If yes, determine if you want to respond now or later.
        i. If now: Respond and then delete the message or move it to archives or the "pending" folder*.
        ii. If later: Add a to-do item to your task management system (Master To-Do List) and move message to the "pending" folder.
    b. If no response is required, archive or delete the message.

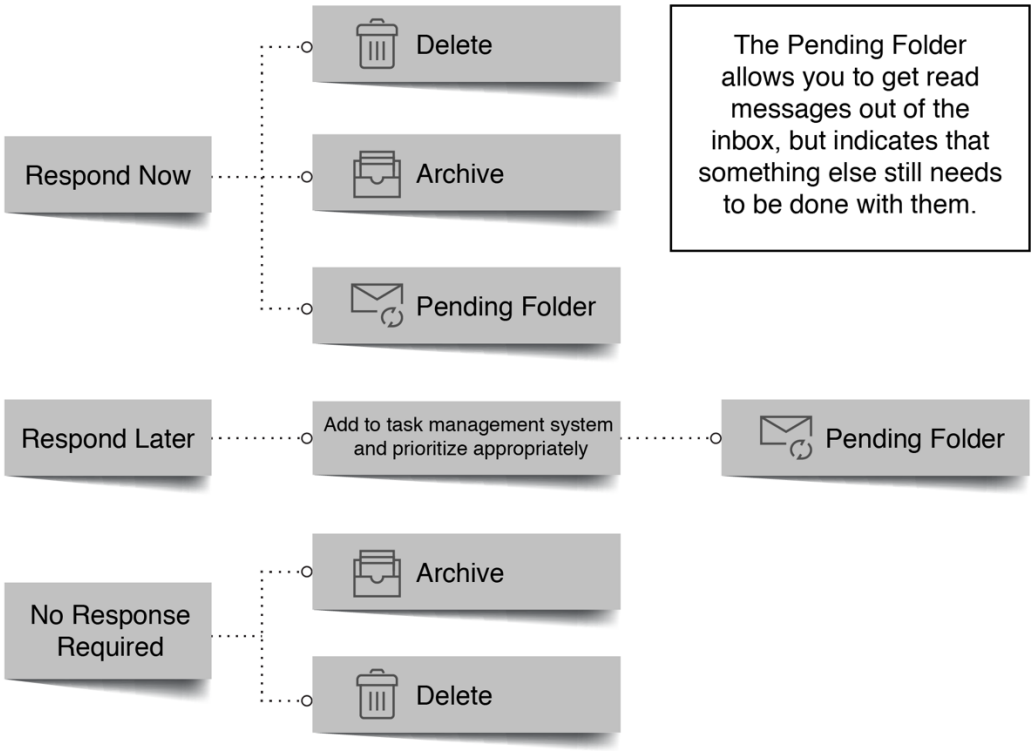
* The "pending" folder is a holding place outside of the primary inbox. When you move messages there, it indicates that something else still needs to be done with them in the future.

EMAIL PROCESSING ROADMAP

1. Read the email.
2. Does it contain to-do items?



3. Does it require a response?



Implementation Activity

- Review the various places where you currently receive and capture tasks. This may include post-it notes, scraps of paper, electronic lists, email, voicemail, etc. Consolidate all of the random tasks together in one location of your choice (paper or electronic is fine for now—this doesn't have to be your permanent choice for the future).

- Add anything else to the list that comes to mind as you're doing this. What do you *need* to do, *want* to do, *should* do? What would you like to maybe possibly do one day? Get it all out! Try to completely empty your brain.

- Start to group things together into categories. What items naturally go together? Consider using a mind map to get your creative juices flowing.

Do as much as you can during the time available. However, realize that you will likely need to continue with this process outside of today's event. Depending on how scattered things are and how much or little you already have in place (with regards to systems), this may take you some time. (A former client of mine spent several weeks capturing and clarifying everything on her plate and getting it all input into an electronic system!)

System 2: Estimating & Tracking

A system for refining your understanding of how long things take and your own productivity patterns.

The problem:

- You're not sure how long things *should* take to complete
- You aren't aware of your own best/worst times of day for focus and energy
- You mindlessly engage in time-wasting behaviors

The result:

- You can't effectively manage expectations
- You can't effectively manage your focus and energy
- You can waste a lot of time on bad habits

The solution: Use a system for estimating and tracking!

"Most people overestimate what they can do in a day, and underestimate what they can do in a month. We overestimate what we can do in a year, and underestimate what we can accomplish in a decade."

MATTHEW KELLY, The Long View

Utilizing Efficiency Audits

An efficiency audit is a simple but effective tool for enhancing your understanding of your own personal productivity rhythms and your ability to estimate how long common tasks should take to complete. The purpose of this exercise is to slow down and think consciously about what you're choosing to do and how you're feeling. It builds self-awareness, a key ingredient for successful time management.

The worksheet on page 45 will help guide you through the process. Note: A downloadable version of this worksheet is available on the Resource Page for this Learning Lab.

Here's how it works: **For 5 days, write down everything you do and the time you spend doing it. To get an accurate view, you need to maintain your log as you go; don't try to go back at the end of the day and remember everything you did and how long it took.**

Track everything you do—getting coffee from the breakroom, going to the restroom, sitting in meetings, talking on the phone, answering email, etc. Note the start time and the end time of each activity. Additionally, take note of the following:

- Priority Quadrant (we will discuss this in System 4 Prioritizing)
- Your Energy Level (from 1 to 10): This is a subjective rating of your physical state, where 1 is extremely low energy and 10 is extremely high
- Your Focus Level (from 1 to 10): This is a subjective rating of your mental state, where 1 is extremely low focus and 10 is extremely high

At the end of the day, tally up the total amount of time spent in Q1 and Q2 (highly productive activities) as well as the total spent in Q3 and Q4 (not productive activities).

Lastly, give yourself an overall productivity score for the day. This, again, is a subjective rating from 1 to 10.

If you do this diligently for 7 days, you will be very annoyed by the end of it! That's normal. It's tedious to track everything you do. But, you will also collect a lot of valuable information.

Time Tracking Technology

While I prefer the tactical element of physically writing things down, there are also time tracking applications that can help you with this activity. Many task/project management software systems include this feature. There are also separate apps specifically for this purpose, some of which are tied to invoicing systems for tracking billable time. The upside to using a tech tool is that you can usually export the data into Excel, should you wish to perform data analysis on it.

Here are a few options:

- Clockify (https://clockify.me/)
- RescueTime (https://www.rescuetime.com/)
- Toggl (https://www.toggl.com/)

Drawbacks

It's worthwhile noting that there are some drawbacks to using tech tools for time tracking. For example:

- Most "off the shelf" tech tools will not include an option to also track energy, focus and priority quadrant, as I recommend. They will only track the time spent on a specific activity.

- Many people find it more difficult/time consuming to learn a new system for this activity, as opposed to simply using a paper worksheet. Additionally, they find the process of opening and updating a tech tool more tedious than it is to just jot things down on paper. (With any tech tool, you still have to track things yourself; sadly, it's not an "automatic" process. Technology isn't that smart yet! Some systems can track the screen you're on, but not what you're actually *doing*.)

- Research shows that the physical act of writing helps to enhance awareness.

Efficiency Audit Worksheet (Sample)

Q = Priority Quadrant E = Energy Level (1 to 10) F = Focus Level (1 to 10)

Date: Monday, June 8, 2022

Start	Stop	Task	Q	E	F	Total Duration Notes
8:00	8:30	Coffee, organizing for the day	2	6	5	30 minutes
8:30	9:00	Email triage, check voicemail	1	6	5	30 minutes
9:00	10:00	Monday morning week review meeting	2	9	7	1 hour
10:00	12:00	Prep board packets	1	6	9	2 hours
12:00	1:00	Get lunch (eat at desk)	2	4	1	1 hour
12:00	1:00	Watch training webinar	2	5	9	1 hour
1:00	1:45	Email triage, client scheduling issue	1	7	9	45 mins
1:45	2:00	Talk to Charlie re: board packets	1	7	9	15 mins
2:00	2:30	Presentation proofing	3	4	4	30 mins
2:30	2:45	Walk to car with Carrie Ann to chat (personal)	4	9	9	15 mins
2:45	4:00	Prep board packets	1	5	3	1 hr. 15 mins
4:00	5:00	Email triage, LinkedIn, calendar clean up	2	3	1	1 hr.

Total Time Q1 + Q2 = 9 hrs. 15 mins

Total Time Q3 + Q4 = 45 mins

Rate Your Total Productivity = 8/10

This worksheet is available as a Word document on the Resource Page for this Learning Lab

How to Evaluate Your Work

Once you've completed the Efficiency Audit exercise (for a minimum of 5 days), evaluate your work and see what you can learn.

Productivity Patterns

- What are your most and least productive/focused times of day?
- When does your energy naturally seem to slump?
- Are you able to adjust your workload to accommodate these natural rhythms?
- Are you taking enough breaks? Do you notice a difference in your energy and focus before and after breaks?
- Are interruptions and distractions more common at certain times of day, and if so, can you plan around them or prevent them?

Time Wasters

- Are there certain activities that trigger you to lose focus and get pulled into a time wasting activity?
- Which activities are taking up more time than they need to and what can you do to manage that?
- Are you spending too much time on Q3 and Q4 activities and if so, what can you do to change that?

Estimating for the Future

- How much time, in a general sense, do your regular daily activities *truly* take?
- How much time do you require for high-focus activities each day?
- Which activities took a longer or shorter amount of time than you would have expected, and how will this insight impact your time management in the future?

Micro vs. Macro Trends

The insights gained in the Efficiency Audit help you to identify both Micro and Macro trends.

Micro Trends refer to your personal experience on a day-to-day basis. For example, you can see your natural productivity rhythms and you can begin to identify the things that impact those rhythms. Therefore, you can begin to make personal changes to enhance your personal productivity.

Macro Trends refer to bigger trends you can see from a wider perspective. After completing this exercise a few different times over the course of a year, for example, you may be able to identify seasonal trends within your organization or team—times during the year where the pace of work increases or decreases based on the market or other outside factors. This kind of information can provide useful insight for your future planning.

You can also learn about **Macro Trends within a group** by having everyone on the team perform an Efficiency Audit. You can then consolidate the data and provide a collective summary of what is happening.

For example, if you ask your team to do this activity, you may discover that (collectively) as a group, you are spending 24% of your time managing interruptions. This would be value information to explore deeper!

Perhaps you would discover that 20% of those interruptions are technology related. Together, as a group, you could explore possible solutions for this situation.

For example…

- Maybe you could create job aides to help people troubleshoot the most common issues on their own.

- Maybe these interruptions should be redirected to the tech support team in the future.

- Perhaps there is a specific type of tech issue that is happening repeatedly, and the tech team should be notified to see if they can provide a more permanent solution.

With data in hand, you are now more empowered to actively manage how the team is using their time, and you're able to see specific areas where work is needed. If and when you must implement solutions, you now can make data-supported requests and evidence-based decisions.

The Power of Data & Tracking

Data is an extremely powerful tool for managing your own expectations and the expectations of others. When you know, based on concrete evidence, how long a certain task is likely to take, you are in a much better position to renegotiate unrealistic demands.

You are also less likely to beat yourself up for your basic human limitations. No matter how efficient you are, there's only so much you can do in any given period of time. Seeing it on paper, in black and white, can help ease the pressure many of us tend to put on ourselves.

The mere process of consciously tracking your activities also has powerful benefits. That which is tracked naturally tends to improve. When you track your spending, you usually spend less. When you track your steps, you usually walk more. Whether the thing you're tracking is increasing or decreasing, it normally goes in the "right" direction. You aren't necessarily trying to improve; you're just making choices more thoughtfully—and that creates a positive outcome.

Recommendation

Conduct a 5-day efficiency audit on a quarterly basis to continually enhance your self-awareness and improve your estimation capabilities.

System 3: Following Up

A system to remind you that a task needs to be completed even when there's no firm due date or when the due date is dependent upon something (or someone) else.

The problem:

- You make requests of others and they don't follow through
- You have tasks without due dates
- You have tasks that must be completed only after a certain "trigger event" has taken place

The result:

- Your work gets delayed because of others' lack of follow through
- Tasks "slip through the cracks" and get forgotten

The solution: Use a system for following up!

Follow-up is the art of "pleasant persistence."
It's not nagging or micromanagement; it's your job.

Scenario Examples

- Your boss mentions off-handedly that she should review the "Work from Home" policy at some point next quarter.

- A vendor lets you know that she is shipping a box to your office and asks you to email her when it arrives.

- You know that the settings you've adjusted for a monthly report might get messed up after the next software update; you need to remember to double check them when the next update happens.

- You are working on a presentation that requires data from Accounting, so you request the data. You are at a standstill with the presentation until that data is received.

- You receive an email request from a client and forward it (delegate it) to your colleague. You plan to email the client back when your colleague has finished the task.

Each of these scenarios creates an opportunity for misstep. It's easy to forget to do something when there's no firm due date or when the due date is dependent upon something (or someone) else.

In each instance, you MUST take action to ensure the task is not forgotten. Each of these scenarios requires some sort of follow-up on your part.

How Follow Up Systems Work

Generally speaking, a follow-up system requires you to:

- Evaluate the situation and determine what the next action on your part is
- Define an “arbitrary” or estimated due date for yourself and/or others
- Create a reminder of this action in your calendar and/or electronic task management system
- When the reminder pops up, take necessary actions; ask yourself if further follow-up is needed
- Move the reminder and/or add new reminders if needed
- When no further follow-up is necessary, delete the reminder(s)

EXAMPLE 1: Your boss mentions off-handedly that she should review the "Work from Home" policy at some point next quarter.

- Set a reminder on your calendar (or in your task management system) for the beginning of next quarter to remind your boss to review the policy.

- If, at that time, your boss isn't ready to do so, move the reminder to another date in the future.

- Continue to remind your boss until she is ready to review the policy.

EXAMPLE 2: A vendor lets you know that she is shipping a box to your office and asks you to email her when it arrives.

- You estimate that the box will arrive in a week. (You can also ask the vendor to provide an estimate of arrival.)

- Set a reminder on your calendar (or in your task management system) for a week from now to email the vendor if the box has arrived.

- If, when the reminder pops up, the box hasn't arrived, move the reminder out by a day or two.

- Keep moving the reminder until the box has arrived and you've emailed the vendor.

EXAMPLE 3: You know that the settings you've adjusted for a monthly report might get messed up after the next software update; you need to remember to double check them when the next update happens.

- Create a recurring reminder in your calendar (or task management system) for each month on or around the date the report is run.

- The reminder should say something like: Double-check settings if software update has taken place.

- Alternatively, you could make it a part of your monthly reporting process to double check settings regardless of whether an update has taken place.

EXAMPLE 4: You are working on a presentation that requires data from Accounting, so you request the data. You are at a standstill with the presentation until that data is received.

- When you make your request for data, define a due date.

- Create a reminder in your calendar or task management system to check and make sure the data has been received by or before that due date.

- If it has, continue working on the presentation and remove the reminder.

- If it has not, follow-up with Accounting and move the reminder to a date in the future by which you expect to have received the data.

- Continue this process until the data is received.

EXAMPLE 5: You receive an email request from a client and forward it (delegate it) to your colleague. You plan to email the client back when your colleague has finished the task.

- Ideally, when you delegate the item to your colleague, you should set a due date for them. If you have no idea how long it should take, ask for them to provide an expected date of completion.

- Create a reminder in your calendar or task management system to check and make sure your colleague has completed the task by or before the due date.

- If he/she has completed it, email the client and remove the reminder.

- If he/she has not completed it, follow up with them and move the reminder to a date in the future by which you expect the task to be completed.

- Continue this process until the task is completed.

Following Up = Thought + Action

This system, more than any other we've discussed so far, requires sophisticated critical thinking skills. You must think through situations and take action today to set yourself up for success tomorrow. **You can't expect that you'll simply remember these things and you can't assume others will do their part.** Leverage the tools at your disposal to "nudge" yourself into action when the time is right.

System 4: Prioritizing

A system to determine the correct order in which to complete your tasks.

The problem:

- You don't have a logical rationale for your prioritization choices
- You complete tasks based on what's easiest, fastest, or first grabs your attention
- You treat *everything* as a high priority

The result:

- You procrastinate and postpone the wrong things
- Your choices create unintended consequences and negative ripple impacts for yourself and others
- You spend too much time and energy on low priority items
- You're not able to effectively manage competing priorities

The solution: Use a system for prioritizing!

What is Prioritizing?

Prioritization is rooted in the understanding that you simply can't do *everything right now.* Though you may like to, it's not a realistic physical possibility. Choices have to be made. If you have an infinite number of tasks to do and only a finite amount of time, energy and attention to devote to them, you have to decide which tasks deserve your resources the most.

Simply put, prioritization is…

- The act of determining the order in which tasks should be completed, based on a holistic view of your workload and each task's relative position

- An intentional decision-making process that involves understanding interconnections and the consequences of your choices

- A process that affords certain (high priority) tasks more time and attention while other (low priority) tasks are strategically postponed or removed from consideration

NOTE: In order to be able to do these things effectively, you MUST have (1) a clear understanding of your role, as discussed earlier and (2) a complete and accurate view of everything on your plate (see System #1 for Capturing and Clarifying).

How to Prioritize

Unfortunately, there is no plug-and-chug formula for determining priorities. Instead, prioritization relies on critical thinking. Essentially, you're trying to understand:

- Which items have the most positive consequences if done?
- Which items have the least negative consequences if not done?

The most commonly cited prioritization methodology involves understanding the difference between importance and urgency, and evaluating every task based on these two elements.

Importance = a measure of VALUE

- How instrumental is this task in achieving the goals and objectives of your role?

- How is this task connected to other tasks, and how instrumental are *they* in achieving organizational objectives?

Urgency = a measure of TIME

- How much time is available for the task's completion?

- How would delay of this task potentially delay other tasks as well?

The Priority Matrix

(AKA Eisenhower Matrix or Steven Covey Time Management Matrix)

Q1. NECESSITY *High Importance, High Urgency* **DO IT** This category generally includes: • Crises • Emergency meetings • Impending deadlines • Pressing problems • Unforeseen events Make sure activities really belong here. It's easy to mistake an activity as urgent and important when it really isn't.	**Q2. PRODUCTIVITY** *High Importance, Low Urgency* **PLAN IT** This category generally includes: • High impact projects • Brainstorming • Planning and prevention • Relationship building • Learning and renewal These tasks are easy to postpone or overlook. But proactively managing these items will prevent them from later landing in Q1.
Q3. DISTRACTION *Low Importance, High Urgency* **RE-EVALUATE IT** This category generally includes: • Unnecessary interruptions • Irrelevant meetings • Unnecessary reports • Unimportant phone calls, emails, etc. Make sure the urgency of these items is really there and not just self-imposed. Actively manage these things and try delegate, streamline and systematize as much as possible.	**Q4. WASTE** *Low Importance, Low Urgency* **DELETE IT** This category generally includes: • Mindless Internet browsing • Busy work • Personal business on work time • Gossip, extensive chat breaks These items are often just procrastination tactics—you can feel busy but you're not really accomplishing anything. Eliminate them as much as possible.

*Your resources should primarily be focused on items in Q1 and Q2

Implementation Activity: Your Priority Matrix

Consider your current workload and the things you do on a regular basis in your role. Which tasks fall into which categories? This worksheet is also available as a Word document on the event Resource Page.

Q1. Necessity (High importance, high urgency)	**Q2. Productivity** (High importance, low urgency)
Q3. Distraction (Low importance, high urgency)	**Q4. Waste** (Low importance, low urgency)

Gaining Clarity

Defining priorities is challenging, and it's a constant practice. Priorities can shift in a moment and you must be prepared to quickly adjust course accordingly. However, you shouldn't feel you're on your own. In the modern workplace, prioritizing is truly a team effort. Here are some strategies to enhance team communication regarding prioritization.

- **Avoid vague priority labels.** Instead of saying something is "urgent," for example, get specific. How urgent is it? Does it need to be done by the end of the day, within a few hours, or right this very minute? Instead of giving a deadline of ASAP, define exactly what that means—do it now, do it next, do it today, etc.

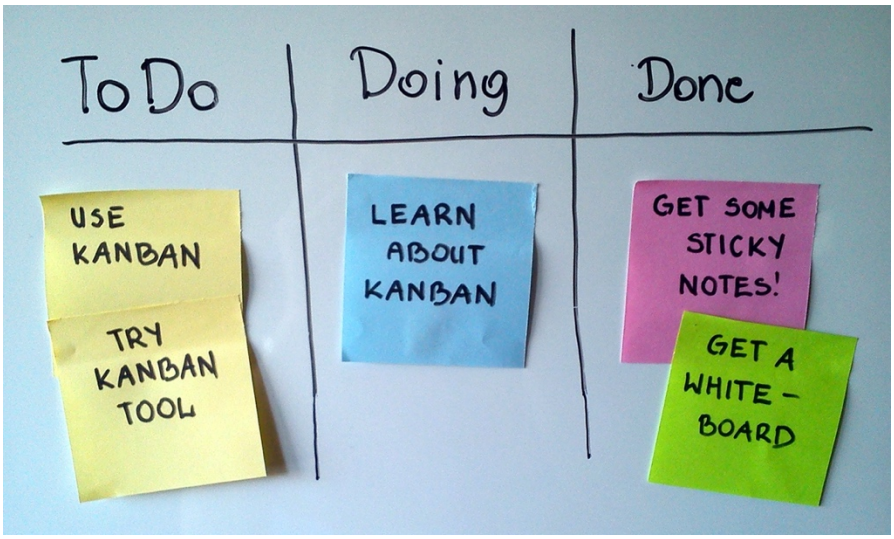
- **Keep priorities visible.** When others can quickly and easily see what your top priorities are, they can immediately understand what has to be shuffled around when a new priority is added to your workload. This can be a useful tool for managing expectations.

- **Ask for help from leaders.** If you're struggling to understand your priorities, don't be afraid to ask for guidance from your leaders. Don't approach it from a place of stress and overwhelm; instead, ask for their support in determining how to best allocate your resources and prioritize your workload. This is a function of management and you should never feel embarrassed or guilty about asking for advice in this area. The more input you get from leadership, the more you will come to understand the key factors for prioritizing and the less you will need their support in the future.

Recommended Tool: Kanban Board

A Kanban board is a tool often used in project management, but which can be applied to personal task management as well. A Kanban Board visually depicts work at various stages of progress (to do, doing, and done). Items move from one stage to the next, either from left to right or top to bottom. It shows, at a glance, what is coming up, what is the current focus, and what has already been done. If you'd prefer, you can modify the categories of progress to suit your unique organizational needs.

Consider keeping a weekly or monthly Kanban board in your workspace to support your prioritization efforts.



Renegotiating Expectations

Part of prioritizing involves negotiating expectations. This is not the same thing as “saying no.” I firmly believe that “no” should be reserved for situations in which you are being asked to do something illegal, unethical or outside of the scope of your role. If something is a legitimate work request and it’s within the scope of your role, it is your responsibility. However, if you unconditionally accept every request, you will inevitably take on too much. Part of your job is to negotiate the conditions of requests to improve your chances of successful delivery.

Clarify	• Make sure you understand what is being asked of you. Request details and specific deadlines (not just "ASAP").
Counter	• Offer an alternative expectation, focusing on what you CAN do, not what you CAN'T do. For example: provide new dealines, revised expected outcomes, etc.
Compromise	• Identify a way forward that will meet the needs of the person making the request AND ensure you're able to successfully deliver.
Confirm	• Reiterate what was agreed upon, if possible, in writing.

Making It Work

Sometimes, even after you've attempted to renegotiate expectations, the original parameters still stand. When this is the case, you have no choice but to make it work. Perhaps you can request more resources or assistance from others, or you may simply need to do the best you can with what you have. You won't always get the perfect outcome, but it's worthwhile trying nonetheless.

Asking for Help

There are times in every professional's work life when they need a little added support from their teammates. Don't shy away from asking for help! Here are some strategies to help you:

- **Be a resource for others first.** The more people already know that you're there for them, the more likely they are to be there for you.

- **Define specifically what kind of help you need.** Don't be vague. Give them clear instructions and deadlines so they can be successful.

- **Ask early.** Don't wait until the last minute. The more flexibility you can offer, the easier it is for people to help.

- **Praise loudly and share credit.** When someone helps you, make sure people know about it (including their manager). This helps elevate their visibility and reputation, which makes them more likely to want to help again in the future.

- **Remember to reciprocate.** When someone steps up and helps you, be willing to do the same for them. Otherwise, you risk losing their support in the future.

- **Realize that your team wants to help!** Most people are more than willing to help out when needed, especially for a trusted team member. As long as you aren't abusing their generosity, they will happily offer support. Some people may even appreciate the opportunity to do the extra work, if they happen to be feeling bored or want to expand their skills in a certain area.

System 5: Scheduling

A system to remind you of time-based tasks (events).

The problem:

- The calendar is incomplete or contains outdated information
- It's difficult to see at a glance what is happening
- Personal and professional events are stored in separate calendars

The result:

- You miss important events or deadlines
- You are late for important events or deadlines
- Time slots end up double booked

The solution: Use a system for scheduling!

No time management system would be complete without a robust, reliable system for scheduling time-dependent tasks (collectively referred to as "events"). Simply put, there is no excuse for any professional to miss something that belongs on the calendar. Yet, it happens frequently. When it does, it's a clear and strong signal to others that you are not successfully managing your time. It can also be perceived that you don't respect *their* time. Forcing others to reschedule or postpone events because of your scheduling mistakes is ineffective and inefficient for everyone.

Scheduling Systems Best Practices

For most professionals, the calendar is a complex web of ever-changing meetings, appointments, deadlines and events. It requires rigorous effort and time to maintain it and to ensure it remains accurate.

While everyone has different preferences as to how they like to handle their calendar, the following strategies are universally accepted as "best practices." Your organization may have limitations that prevent you from fully integrating all of these. As always, do what you can and modify as needed to work for your situation.

- **Keep one electronic calendar that contains ALL items both personal and professional.** Alternatively, if you want to keep them separate, you can import one into another as an overlay so you can see all appointments across calendars simultaneously. (Search your calendaring system to find instructions for how to do this.) Seeing all events in one place prevents accidentally double-booking yourself and streamlines management.

- **Use color codes to mark different types of events**, such as onsite meetings, virtual meetings, phone calls, out-of-office appointments, etc. This allows you to quickly see at a glance what is happening on any given day, week, month, etc.

- **Mark tentative items on the calendar** so you don't book over them accidently. If you send an email to a colleague suggesting a day and time to meet, you need to mark it on your calendar. Even though it's not yet confirmed, you still must reserve the time. Otherwise, you run the risk of booking over it.

- **Mark travel time to and from off-site locations**. If you're attending a meeting on the other side of town at 10:00 AM, it's not enough to mark the meeting on the calendar. You must also note the time it takes to get to the location and then from

the location back to your office. Otherwise, you run the risk of booking yourself too tight.

- **Schedule notifications to remind you approximately 10 minutes before an event is scheduled to begin**. This is generally enough time to wrap up what you're working on and get prepared for the next event.

- **Avoid booking back-to-back events**. Doing so can cause trouble if a meeting or phone call runs long. Even if everything ends perfectly on time, you still need a few minutes to use the restroom, grab some water, and refresh mentally and physically between events. If you can't avoid back-to-back meetings, be clear upfront that you have a hard stop at the end of the meeting (and possibly suggest wrapping up 10 minutes early).

- **Consider blocking time on the calendar to schedule important work and concentration time.** Psychological research shows that we are more likely to do something if we view it as an appointment—even if the appointment is only with ourselves.

    - Remember what you've learned about your productivity patterns and choose focus times that leverage your natural rhythms.

- **Be an advocate for productive meetings in your organization, both as an attendee and as the meeting organizer.** This topic is explored more in the Appendix on pages 94-95.

- **Review the calendar every day, multiple times a day.** Look at the day, the next few days, the week, the next few weeks, and so on. Keep one eye on where you are, and one on where you're going.

- **If possible, allow others in your organization to view your calendar**. You may want to set personal appointments as "private" so others can see that time is blocked but can't see any details. This will help enhance scheduling efficiency and may reduce interruptions (if people see you have time blocked for important work).

- **Consider using meeting scheduling tools to streamline the process of finding agreeable days/times for all parties**. Some options include Doodle (https://doodle.com/en/) and Rally (https://rallly.co/).

A well-maintained calendar can also be a great reference tool for the future. Personally, I even find it valuable to go back and add items to the calendar after the fact just to ensure it accurately reflects exactly where I was and what I was doing throughout each day.

System 6: Managing Routine Tasks

A system to track and organize tasks that are done on a repeating schedule

The problem:

- You trust your routines are "habitual" but find that the habit often gets overridden by more pressing, top-of-mind items
- Routine tasks must be done regularly but sometimes with lots of time between occurrences

The result:

- Routine tasks get lost, forgotten or perpetually postponed
- So much time passes that you end up reinventing the wheel each time you do a routine task

The solution: Use a system for managing routine tasks!

Routine tasks are recurring tasks that must be done on a regular schedule, whether daily, weekly, monthly, quarterly or annually.

For example, in my business, I conduct a "member audit" on a quarterly basis to ensure all members of my learning library are receiving the appropriate email notifications when new items are added. (This is an unfortunate workaround required because my technical set-up is imperfect.) It's an important task that I don't want to lose track of, but it's also complicated. There are many steps involved that I tend to forget from quarter to quarter.

If I don't have an established way of remembering this task—and a clearly defined process for doing it—I am likely to forget about it and/or spend an unnecessary amount of time on it each quarter.

You, very likely, have similar routine tasks for which you are responsible. Take a moment to brainstorm some in the area below:

Creating Your System

To create a system for managing routine tasks, take the following 4 steps:

1. Define the recurring tasks and organize them by interval to create a "perpetual calendar" for reference. (See sample on the following page.)

2. Schedule the recurring tasks on a repeated cycle in your calendar or task management system so you are automatically reminded of them at the appropriate time.

3. Systematize the recurring tasks that are done infrequently. Use templates, checklists, worksheets, flow charts, etc. to avoid starting from scratch each time.

   - What system documentation do you currently use for your routine tasks?
   - Resource Recommendation: *Become a Procedures Pro* by Julie Perrine

4. Review your perpetual calendar regularly to ensure you're maintaining your routines. (We'll discuss this more in the next section.)

Sample Perpetual Calendar

Interval	Task
Daily (AM)	Engage in some form of learning for 20 minutes (reading or online training)
Daily (AM)	Update LinkedIn: Approve connection requests, respond to comments, approve Learning Lab participants, post one update
Daily (PM)	Tidy up office
Weekly (Mon)	Create and schedule promotional emails (2 to 3 weeks ahead)
Weekly (Mon)	Run time machine
Weekly (Mon)	Schedule social media posts (2 to 3 weeks ahead)
Weekly (Fri)	Update Asana
Weekly (Fri)	Process email to empty
Weekly (Fri)	Plan for upcoming week
Weekly (Fri)	Conduct a full project review

Weekly	Respond to forum posts in library
Monthly (1st week)	Create member spotlight for library
Monthly (1st week)	Complete analytics report
Monthly (1st week)	Run “removal” plugin for expired members
Monthly (1st week)	Update QuickBooks and review financials (follow up on invoices if needed)
Monthly	Conduct website maintenance for Eat Your Career and Career Success Library (CM)
Monthly (3rd or 4th Weds)	Deliver public training webinar
Monthly (T/Th, EOM)	Create and schedule e-newsletter
Every Other Month	Conduct website maintenance for Elevate
Every Other Month	Create and schedule library members-only newsletter / update
Quarterly	Clean out digital and paper files

Quarterly	Conduct public Q&A session
Quarterly • Jan 15 • April 15 • June 15 • Sept 15	Pay and send estimated taxes
Quarterly	Complete member audit
Quarterly	Calculate, pay and send affiliate payouts
Quarterly	Conduct website clean-up for EYC and CSL (CM)
Annually (Jan. 20)	Pay and send sales taxes
Annually (April 15)	Pay and send income taxes
Annually (Jan)	Complete Active Campaign clean up
Annually (Oct-Nov)	Create next year's training and content calendar

System 7: Reflecting

A system to review and reset on a regular basis.

The problem:

- You're always busy "doing," but you're not actually sure what you've accomplished!
- You're so focused on today, you don't have time to stop and plan for the future
- You get so focused on the "big stuff," you often allow the "little stuff" to fall by the wayside

The result:

- You struggle to get ahead of things; you're perpetually playing catch up
- You're ill-prepared to spontaneously discuss your achievements, needs, or progress
- You're unclear about where you are and where you're headed next

The solution: Use a system for reflecting!

"Most people feel best about their work before their vacation, but it's not because of the vacation itself. What do you do the last week before you leave on a big trip? You clean up, close up, clarify and renegotiate all your agreements with yourself and others."

DAVID ALLEN, *GETTING THINGS DONE*

Defining Reflecting Activities

Reflecting is a combination of review (looking at the past) and reset (preparing for the future).

Regular reflection activities can provide you with peace of mind and clarity. It is easy to neglect this kind of work; it falls squarely in Q2 (Highly important, though not urgent). But when you prioritize this, you will reap tremendous benefits, both personally and professionally.

Reflection activities should take place regularly at various intervals. By doing these things frequently, you stay on top of them, making them easier and faster to complete.

These are higher-level activities than your regular routine tasks. They don't necessarily have a "due date" per se, and it's very likely no one else will depend on you to do them. *These activities are for YOU.* They help you gain perspective. They help you feel in control of your little slice of the world, and they set you up for success in the future.

What you include in your Review & Reset is totally up to you. Some activities may be highly tactical (like clearing your email inbox to empty or filing paperwork) and some may be more strategic (like noting your recent accomplishments or reviewing your career goals). You can also create a Review & Reset system for your personal life too!

On pages 80 and 81, I've shared both my weekly personal and professional reflection systems. Yours will definitely look different, but this will give you an idea of how the process works.

I conduct my professional Weekly Review & Reset on Friday afternoons, unless circumstances prevent me from doing so. If that's the case, I will always do it over the weekend, prior to starting work again on Monday. I try to never start a week without doing this.

I began this practice while working as an Executive Assistant and it has never failed me. It was a game-changer when I discovered it, and it continues to be a life-saver. I credit this process for enabling me to build and maintain a high volume business as a solo-entrepreneur—without losing my mind!

I conduct my personal Weekly Review & Reset over the weekend. I generally space the activities out, so it doesn't feel like a big chore list, and I also include the rest of my family in the process. We all enjoy the feeling of getting "centered."

Again, you can choose to do yours in any way that suits your schedule.

I have found that, if I'm on vacation or feeling under the weather, I can skip my Review & Reset for a week without too much pain. However, I never want to go two weeks without doing it. This will create a backlog of work that makes it much harder to get back into the rhythm.

About Intervals

You may have some activities you want to do occasionally, but not necessarily weekly. For example, maybe you want to update your resume on a quarterly basis. You can have a separate Quarterly Review & Reset process (or Monthly, Annual, etc.), in addition to your Weekly process.

Personally, I also do a “micro” Review and Reset on a daily basis. I do this personally and professionally.

At home, I think of these activities as my “morning routine” (which involves prayer, quiet time, coffee drinking, personal hygiene activities, etc.) and my “evening routine” (which involves tea, journaling, etc.). These things help bookend my day with positive time focused on my needs.

At the office, I think of these activities as my “start of day routine” (which involves checking email and voicemail, reviewing my plan for the day, etc.) and my “end of day routine” (which involves clearing my desk, shutting down my computer, etc.). These things help me mentally and physically ramp up and ramp down.

While I am not perfect about following these routines every single day, I find that when I do them, I am much more focused and productive all day long. Additionally, when I’m in a good rhythm, my Weekly Review & Reset process is also easier/faster.

My Weekly Review & Reset (Professional)

- ☐ Process email inbox to empty
- ☐ Process mail (file, shred, action item)
- ☐ File paperwork / shred paperwork
- ☐ Clean out wallet and file receipts
- ☐ Clear computer desktop
- ☐ Transfer files to Dropbox
- ☐ Organize office, take out trash/recycling
- ☐ Review bank accounts; make transfers if needed
- ☐ Review autopay list
- ☐ Review credit card accounts; make payments if needed
- ☐ Review calendar
- ☐ Review upcoming webinars and define/schedule next actions
- ☐ Review onsite events and define/schedule next actions
- ☐ Review blog schedule and define/schedule next actions
- ☐ Review prospects and follow up if needed
- ☐ Review outstanding invoices and follow up if needed
- ☐ Review other projects and define/schedule next actions
- ☐ Review routine tasks list/important dates and verify timely action
- ☐ Review professional development activities and define/schedule next actions
- ☐ Review and update Asana
- ☐ Migrate any random tasks collected (planner, post-its) to Asana
- ☐ Track stats: E-news, CSL Members, upcoming Learning Labs, LI network
- ☐ Review business goals and note progress
- ☐ Reset Kanban board if needed
- ☐ Reset planner if needed

Note: My list is long! Yours doesn't have to be. I spend anywhere from 1 to 3 hours on this each week. But it's also one of the most satisfying parts of my week.

My Weekly Review & Reset (Personal)

- ☐ Plan meals for the week
- ☐ Grocery shop
- ☐ Clean out fridge
- ☐ Call Mom & Dad
- ☐ Do laundry
- ☐ Pick up house
- ☐ Clean out car (wash car if needed)
- ☐ Other errands: Bank, dry cleaning, etc.
- ☐ Schedule workouts for week ahead
- ☐ Set up wellness tracker for week ahead
- ☐ Add other household activities for the week to calendar
- ☐ MONTHLY: Review calendar for upcoming birthdays or other events and take note of gifts that need to be purchased and any other tasks required

Implementation Activity

Brainstorm what you would like to include in your Weekly Review & Reset. You will probably need to spend more time on this to put together a complete list. Just get started in the time you have.

Appendix

The following additional materials are provided to enhance your learning experience

Managing Space

Keeping an organized space is important for two reasons: Function and perception. We already discussed the functionality piece earlier, so let's briefly explore perceptions.

Your organizational habits (or lack thereof) deeply impact how others see you. They provide visible clues about who you are and what you bring to the table. People mentally associate organization with a whole host of other traits.

Organized people are seen as…	**Disorganized people are seen as…**
Mature	Immature
Disciplined	Undisciplined
Competent	Incompetent
Intelligent or Experienced	Unintelligent or Inexperienced
Valuable	Not Valuable
Focused	Unfocused
Hard Working	Lazy
Driven or Ambitious	Unambitious

While these things might not necessarily be true, they are subconscious perceptions—and perception is reality. If people perceive you as something, they treat you that way. They look for confirmation that you ARE that way. This can work for you or against you in the workplace. It benefits the organized people and creates enormous unspoken obstacles for the disorganized ones.

Here's some evidence to reinforce my point:

- 28% of supervisors are less inclined to promote someone with a cluttered desk. *(Career Builder Survey)*

- 57% of workers admit they judge their colleagues by how clean or dirty they keep their workspace. Half say they are "appalled" by messy offices and chalk it up to pure laziness. *(Adecco Staffing Firm)*

- Clutter limits your brain's ability to process information. Clutter makes you distracted and unable to process information as well as you do in an uncluttered, organized environment. *(Princeton University Neuroscience Institute)*

When someone walks by your work area, what perceptions do you want them to have?

Take a look around your workspace. Evaluate it with fresh eyes. What might an outside observer think of the person who works here?

Physical Space Management Best Practices

Managing your physical workspace requires strong daily habits. After all, throughout any given day, your area is used for collecting and handling work-in-process. The goal is not to maintain a perfectly "empty" space. Rather, it is to keep the space orderly and return it to a tidy condition at the end of each day.

1. Remove Clutter

Clutter is anything that doesn't serve a purpose. Don't bring in new clutter without taking a piece of clutter out.

2. Evaluate Your Workspace Zones

Zoning is a useful tool for thoughtfully creating an organized workspace. Review the zones defined below and determine how well your space is currently arranged. If needed, make adjustments to ensure your set up is effective.

- **Zone 1:** The items you use daily. These will be the things you use all the time, and they should be closest to you. You want to have as little as possible in this zone. Examples include: pens, computer, keyboard, and Kleenex.

- **Zone 2:** The items you use frequently. These should be within reach or just a step away, but not actually on your desk. Perhaps they're in drawers or cabinets very close by. Examples include: stapler, screen wipes, scissors, and paper clips.

- **Zone 3:** The items you use occasionally. These should be the next closest, usually within a few steps of your desk. Perhaps they're in a cupboard or file cabinet or on a shelf. Examples include: paperwork, files, and reference manuals.

- **Zone 4:** The items you use rarely—or the items that don't fit inside your workspace. These could be items you put inside a storage closet of some kind. Examples include: extra office supplies and archived paperwork.

- **Zone 5:** The items you never use. Are you holding onto items that you simply do not use? If so, redistribute them to others, recycle them, trash them or pack them away into long-term storage.

**Zones 4 and 5 are not pictured here as they are not in the workspace itself.*

3. Personalize Your Space (Within Reason)

Your workspace is a reflection of you as a person and as a professional, so it's perfectly acceptable to make it your own. A few personal touches can help show others what's important to you and make the space feel more comfortable. However, it can be overdone. After all, this is a professional environment; it's not your home. Its primary purpose is for work and the area should reflect that.

As you personalize your space, keep this in mind: Too much *of anything* can be a problem.

Too Many…	**Can Say…**
Awards and certificates	You're overly concerned with proving yourself or demanding respect for past accomplishments
Pictures of outside hobbies	You're daydreaming about being somewhere else
Candy dishes, cozy chairs, photos of people	You're inviting people to get comfortable and linger
Humorous posters, whimsical images, toys	You don't take work seriously

Remember: A little goes a long way!

4. The "Touch It Once" Rule

As much as possible, try to touch things once—for example: immediately after using a reference binder, put it back where it belongs. This prevents pile up.

5. Adopt a 10-Minute End-of-Day "Wrap Up" Routine

Ideally you want to put things away as you go, but it's not always possible. As a back-up measure, ensure your workspace is reorganized before you leave each day.

- Clean off your desk and workspace; transfer any paper notes to their appropriate systems (i.e. to do list, calendar, etc.)

- File, trash or shred any paperwork that has accumulated

- Clear your computer desktop of accumulated files

- Any other relevant activity to get your workspace back in order for the next day

Paper Management Best Practices

Paper management in the office is like laundry at home: it's a never-ending chore. Your goal should be to stay on-top of it so it doesn't pile up and cause confusion.

1. Reduce paper as much as possible

Don't fall into the habit of saving every document that crosses your path. Much of the paperwork people store is unnecessary and only adds to the difficulty of paper management. Before you determine whether or not to keep a document, consider the following:

- Is this a document I am required to keep in physical form per company policy? Can it be scanned and stored electronically?
- Is this a document I will need to reference again in the future? Does it contain information I can easily access again via my computer?

Purge files at least twice a year and shred, recycle or trash anything that is no longer needed. Be sure to reference your organization's retention policies as you do.

2. File for accuracy and efficiency

The goal of any filing system is to be able to retrieve necessary items quickly. To that end, consider the following:

- Color coding labels can improve retrieval time by up to 40% (per record-keeping experts) and makes identifying misfiles easier to spot.
- Remove miscellaneous paper clutter such as staples, paperclips and sticky notes.
- Don't allow files to become overstuffed; instead, create sub-categories to separate items into smaller batches.
- Maintain order within the file folder itself; do not just stack items randomly.
- Ensure everyone using the filing system is following the same rules.

3. Create a "catch it" system for unfiled paperwork

Not all paper can be filed immediately. However, it should not all be kept in a single pile. Instead, separate it out into logical categories such as:

- To file
- To do
- To call
- To follow-up on

Keep these in-process documents in the same area within separate folders, baskets or trays to ensure they are not mixed up. Label them clearly so others in the office can locate necessary items if/when you are away and regularly review them to prevent overflow.

Many professionals also keep a clearly designated "inbox" on their desk for incoming documents. This helps corral items as they arrive and prevents people from simply tossing them on any open surface where they may be accidentally mishandled.

DID YOU KNOW?

30% of documents in filing systems contain obsolete information.
K2 GOING PAPERLESS STUDY

7.5% of all company documents are lost. 3% of all documents are misfiled.
PRICEWATERHOUSECOOPER STUDY

Virtual Space Management Best Practices

Part of controlling the environment involves managing the virtual environment. In the workplace, anyone can look over your shoulder and view what's happening on your computer screen. If you're not able to quickly locate the items you need when you need them, your digital space may need some reorganization.

1. Ensure all files are saved within folders; nothing should be "floating" around without a home in your digital directory. Think of it as you do a paper filing cabinet—you wouldn't place random documents in there outside of folders, so don't do that in your digital filing cabinet either.

2. Establish a logical, tiered filing structure that starts with a general category and gets more specific as it goes deeper (with sub-folders). It may be helpful to map your structure out on paper to better visualize how you want to organize it.

3. Create specific, consistent names for files and folders using keywords; never use generic labels that don't truly represent what something is. This will help enhance the functionality of your computer search features.

4. Keep your computer desktop as clean as possible. Don't permanently store items there as it's impossible to keep them in any specific order and many programs do not automatically backup the desktop. Keep permanent files in folders in the root directory instead (e.g. the My Documents Library). If storing temporary files on the desktop, keep them in a single folder and purge it frequently. If new programs automatically install shortcuts* on the desktop, remove them and access the program from the main menu.

5. Don't save the same document in different places. If you want to access a single document from multiple locations, create shortcuts* instead. The shortcut creates an access point but maintains one "true" document. This prevents confusion when making revisions.

6. Regularly purge unnecessary files. Store items you no longer need to access frequently in an Archives folder.

**Shortcuts are depicted with a little arrow on the bottom left-hand side of the icon.*

Task Processing Strategies

Strategy	Description
Batching	Complete all tasks of a similar nature in one period of time to leverage mental "flow."
Time Blocking	Mark time on the calendar to complete certain tasks or batches of tasks. "A 40-hour time-blocked work week produces the same amount of output as a 60+ hour work week pursued without structure." *(Cal Newport, productivity expert)*
Delegating	Assign tasks to other parties as appropriate. Define expectations clearly, make yourself available as a resource, and follow-up frequently to ensure progress is happening. Remember that you retain ultimate responsibility for delegated items.
Theme Days	Assign certain tasks to certain days. For example: Wednesday are for expense reports, Thursdays are for travel planning, Fridays are for scheduling all virtual meetings, etc. This helps you organize your day and also helps create clear expectations for others.
Pomodoro Technique	This strategy involves breaking work into time intervals, traditionally 25 minutes in length, separated by short breaks, typically 5 minutes. Each interval is known as a "pomodoro," named after the tomato shaped kitchen timer the inventor of this method used.

Managing Distractions & Interruptions

- Distraction: Something our attention wants.
- Interruption: Something that wants our attention.

Take Control of Tech	You are in charge! Stop letting your notifications run the day.
Serial Tasking	"Multi-tasking decreases productivity by 40% and lowers your IQ by 10 points." *(Harvard Business Review)* Attempting to do two or more things at once wastes time and diminishes performance of both tasks. Practice serial tasking instead—focus fully on one task until you reach the appropriate stopping point. Improve your ability to concentrate on the task at hand and then move on to the next.
Concise Communication	The ability to listen, quickly understand what is needed and respond appropriately, even if not stopping to immediately to handle the request. For example, you might say, "Yes, I'm happy to take care of that for you but I'm right in the middle of something. Can you send me an email with details?"
Rapid Refocus	The ability to quickly shift your attention from one thing to the next without losing momentum.

Best Practices for Productive Meetings

- Define the purpose of the meeting and make sure a meeting is really the appropriate medium for the topic at hand.
    - For example, if you just want to give a quick status update on a project, would an email or phone call suffice?
    - Meetings are best used for making team-based decisions, engaging in group brainstorming and problem solving, discussing hotly debated topics, etc.

- Start and end the meeting on time. Do not backtrack for people who are late as it sets a bad precedent for those who were on-time. (Why bother if you aren't going to miss anything?) Instead, offer to catch people up outside of the meeting if needed.

- Always have an agenda and pass it out early to attendees for their review. Everyone should know exactly why the meeting is taking place and they should be prepared for discussion topics.

- Provide meeting materials early for review. If you are sharing a lot of data and want people to have time to process it, don't expect them to do it in the meeting.

- Invite exactly who is needed in the meeting and no one more. Extra people create distraction.

- Request that someone in the meeting take notes regarding discussion topics, commitments and next actions.

- At the end of the meeting, articulate exactly what the next steps are and who is responsible for what. Never conclude a meeting without gaining clarity about what

was accomplished and what is required from here. Otherwise, you run the risk of having the same meeting over and over again.

- Follow up after the meeting to ensure everyone knows what they are responsible for. Sending an email with the meeting notes and defined commitments is an easy way to accomplish this.

Recommended Reading

Atomic Habits: An Easy & Proven Way to Build Good Habits and Break Bad Ones by James Clear

Become a Procedures Pro: The Admin's Guide to Developing Effective Office Systems and Procedures by Julie Perrine

Deep Work: Rules for Focused Success in a Distracted World by Cal Newport

Getting Things Done: The Art of Stress-Free Productivity by David Allen

The 4 Disciplines of Execution: Achieving Your Wildly Important Goals by Chris McChesney

The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change by Stephen R. Covey

The Checklist Manifesto: How to Get Things Right by Atul Gawande

The Proactive Professional: How to Stop Playing Catch Up & Start Getting Ahead at Work (and in Life!) by Chrissy Scivicque

What To Do When There's Too Much To Do: Reduce Tasks, Increase Results, and Save 90 Minutes a Day by Laura Stack

Work Clean: The Life-Changing Power of Mise-en-Place to Organize Your Life, Work and Mind by Dan Charnas

About Your Presenter

Chrissy Scivicque is a certified Project Management Professional (PMP) and certified Professional Career Manager (PCM). She is also the founder of EatYourCareer.com, a website devoted to "helping you create a *nourishing* professional life." Through her company (CCS Ventures, LLC), Chrissy provides education, resources and support to help elevate workplace performance and increase career satisfaction.

Chrissy has developed and delivered training for professionals inside some of the world's most recognized companies including Accenture, Capital One, Microsoft, Northrop Grumman, W.W. Grainger, TIAA-CREF, Georgia Power, GoDaddy, Turner Broadcasting, and more. (References are available upon request.) Working in coordination with stakeholders in the organization, Chrissy helps define desired business outcomes and creates measurable, positive results with her work.

Chrissy is currently a former career expert for *U.S. News & World Report* and her work is regularly featured on other popular sites including Monster.com and CareerBuilder. She has published over 500 articles on career-related topics and is the author of 3 books: *The Proactive Professional*, *The Invisibility Cure*, and *ELEVATE Admins*. (All are available on Amazon.)

Chrissy lives in Denver, CO and served as the featured career expert on *Good Day Colorado* for 2 years.

About Eat Your Career

EAT YOUR CAREER

Chrissy believes that work can be an enriching, *nourishing* life experience. She loves helping professionals figure out what that means *for them* and how to achieve it.

We provide professional development training and resources to help you conquer career complacency & find fulfillment at work.

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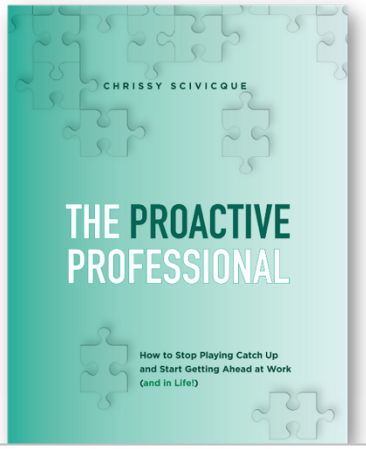

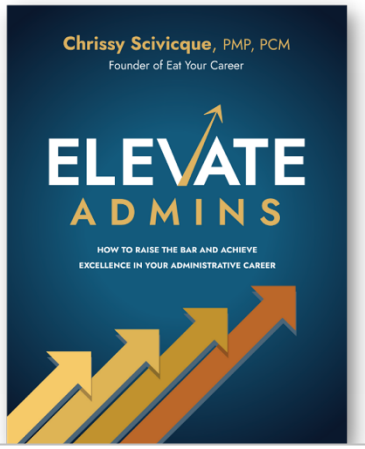

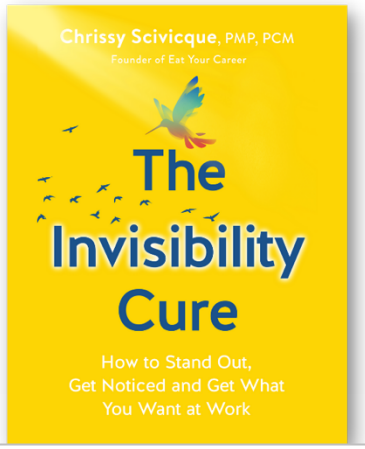

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