

Planning Wisely

Unit

3

Unit 3

Planning Wisely

Learning Outcomes

On successful completion of this unit the learner will be able to:

- ✓ Identify how to develop plans for doing things wisely.

Getting Organized

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

Surface of the Desk

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

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

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

Contents of the Desk

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

Check to make sure of the following:

- You have all the tools you need and they are in good working order.
- Tools are organized so that similar tools are together and easily accessible. Useless tools should be discarded or moved to an area to be fixed.
- Group like items together; for example, stationery, envelopes, and stamps are all in one drawer.
- Store any extra supplies in a supply area.

- Tools should be stored in a shallow desk drawer and are not on the desk.

Guidelines for Keeping a Piece of Paper

Am I going to need to refer to this later?

- YES: File it
- NO: Recycle it

Do I have a digital copy that will suffice?

- YES: Recycle it
- NO: File it

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

- YES: Recycle it
- NO: File it

Do I need to keep this for legal reasons?

- YES: File it
- NO: Recycle it

Does it fit in my filing system?

- YES: File it
- NO: Recycle it

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

- YES: File it
- NO: Recycle it

Organizing Your Files

Sorting Based on File Type

The key principles of retrieval are:

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

File Categories

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

Working Files

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

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

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

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

Reference Files

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

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

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

Information that should be in the reference file includes:

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

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

- Sponsor files
- Administrative information

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

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

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

Archive Files

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

Disaster Files

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

Electronic Files

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

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

Briefcase

Your briefcase should be organized with:

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

The Batching Technique

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

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

Here are some examples:

- **Word processing files:** Batched and placed in categories. Develop a tree of directories and subdirectories, using the same categories as in the paper filing system.

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

Managing Your Workload

Managing E-mail

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

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

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

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

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

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

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

Since we normally have lots of additional tasks in the day in addition to e-mail (like meetings, administration, performance management, and coaching), is it any wonder that we struggle to get through the day? Add to this the time you might take to read reports, meeting minutes, or agendas; process information; or work on projects; eat a healthy lunch; and perhaps invest some time in your people; and it's no wonder we are often looking for more time!

Workload Analysis

These questions form the basis of workload analysis:

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

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

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

The 168 Hour Plan

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

Task	Number of Hours
Personal Life	
Sleeping/eating	
Grooming/hygiene	
Driving or riding	
Exercising	
Cleaning/maintenance	
Talking to family/friends	
Mail/personal business	
Volunteering	
Praying/attending church/meditating	
Studying/reading	
Relaxing/watching TV	
Thinking/worrying/planning	
Other	
Sub-Total	
Business Life	
Planning/research	

Paperwork/computer	
Talking to co-workers/staff	
Appointments/meetings	
Clients/customers	
Phone calls	
Production	
Other	
Sub-Total	
GRAND TOTAL (168 hours)	

Test Your Knowledge

Debrief

Was it hard to remember how you spent your time?

Did you take any time out this past week just for you?

How many things did you do that you planned to do?

How many things did you put off?

What is it you want to spend more time doing?

What do you want to do less?

Are you happy with the way you spent your time?

How many of these hours did you spend on the things that you said were a high priority for me?

When I look at my life so far, I'm glad I took the time to...

I regret I haven't taken the time to...

I can change this by...
