

WA14: Office Effectiveness and Efficiency

3.26 Use planning skills to accomplish tasks to agreed deadlines

LO90: Demonstrate ability to prioritise all activities to ensure work is completed to agreed deadlines.



Module Details



Work Area Code:	14
Work area title:	Office Effectiveness and Efficiency
Unit Code:	3.26
Unit Title:	Use planning skills to accomplish tasks to agreed deadlines
Learning Outcomes Ids:	LO90
Learning Outcomes titles:	- Demonstrate ability to prioritise all activities to ensure work is completed to agreed deadlines. (LO90).
Recommended Duration:	2,5 hours
Trainer:	



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Time management VS Planning



Time management VS Planning



- How would you define time management and planning?
- How would you define organizing?
- What is the difference among those terms?

Group discussion



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Time management VS Planning



- **TIME MANAGEMENT** refers to increasing the efficiency of individuals through the **organization** of task using techniques such as **PLANNING**.

“All time management begins with planning.”

~ Tom Greening



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Time management VS Organization



- **Organizing** is the act of rearranging items that are in a disorganized, cluttered state so that everything can be retrieved quickly with less effort.
- **Time management** refers to increasing both the efficiency and the effectiveness of individuals and organizations through the organization of tasks and events by using specific tools.
- The two activities are interrelated since **disorganization normally wastes time**. The major difference between organizing and time management is that, in general, **organizing deals with things** and **time management deals with activities** that have a time dimension.



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Time management defined



- Generally, time management refers to **the development of processes** and tools that **increase efficiency and productivity**.
- The process of organizing and planning how to divide your time between specific activities.
- Good time management enables you to **work smarter – not harder** – so that you get more done in less time, even when time is tight and pressures are high.
- **Failing to manage your time damages your effectiveness and causes stress.**



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Time management defined



Time Management includes these basic principles:

- Effective Planning
- Setting goals and objectives
- Setting deadlines /scheduling
- Delegation of responsibilities
- Prioritizing activities as per their importance
- Spending the right time on the right activity decision-making;



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- **Short term:**

The process of setting smaller, intermediate milestones to achieve within closer time frames when moving toward an important overall goal. Usually it requires only a few steps to achieve. Short term goals can usually be completed within six months.

- **Long term:** closely related to a vision and strategy. Requires more steps, more time, and often more planning, dedication, resources - can include numerous short term goals.





Goals / Objectives =
achievements that are well defined,
specific, measurable.

Activities = Efforts conducted to
achieve the objectives



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Goals ≠ Activities

Activities ✕	Goals ✓
Writing weekly sales report	Increase sales by 10%
Handling customer complaints and other problems	Reduce customer turnover by 15%
Meeting weekly to discuss new product development project	Launch five new products this year
Participating in quality-control training programme	Cut production waste by 20%





If managers confusing activities and goals, they may come up to several problems:

- They may potentially reward activity that does not contribute to your organization's goals.
- Their team may believe that it is responsible for activity and not results.
- They waste lots of time doing stuff that adds no value.
- The tasks required to achieve a goal may change as circumstances do. If they continue with the same list of tasks, they are unlikely to achieve goals.





- Work during the evenings and weekends
- Feeling out of control
- Making decisions under time-stress
- Inability to reject a task
- Little time for family and hobbies
- Constantly „catching up“
- Jumping from one task to another
- Poor punctuality



Analyzing personal energy allocation



- Try to remember your last 2-3 working days, at what times during the day have you been most /least productive?
- At what day times you tend to work on the most difficult tasks?
- Do those times correlate?

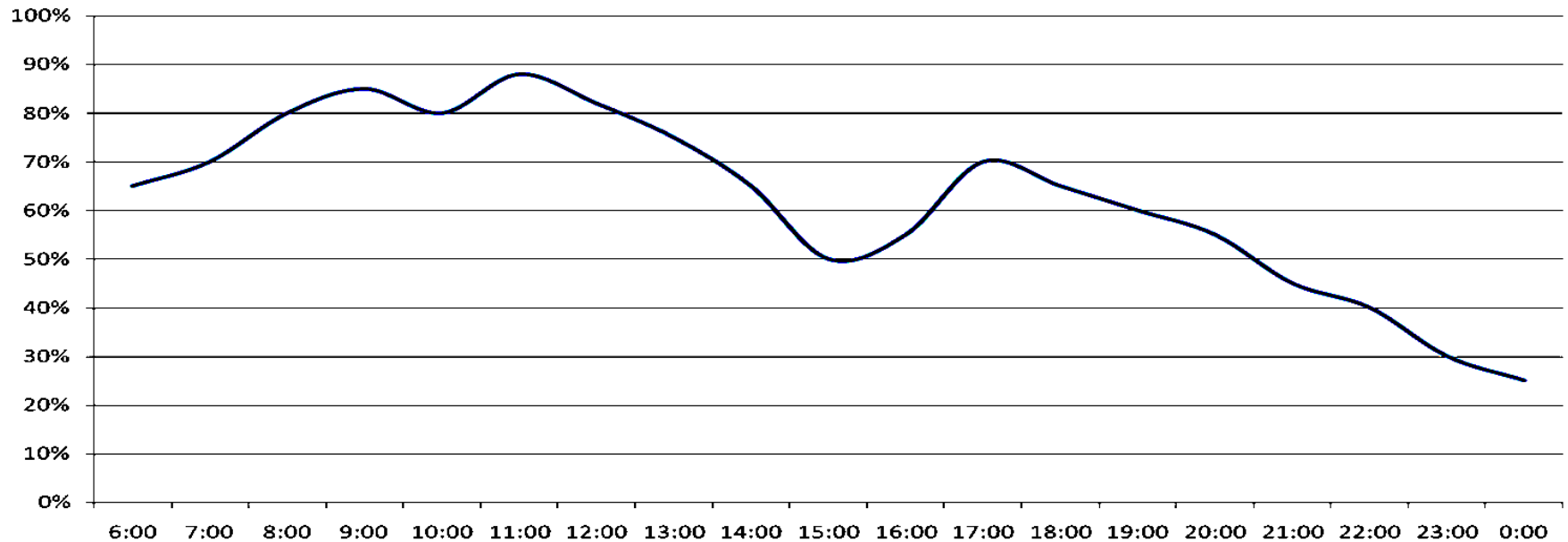
Group discussion



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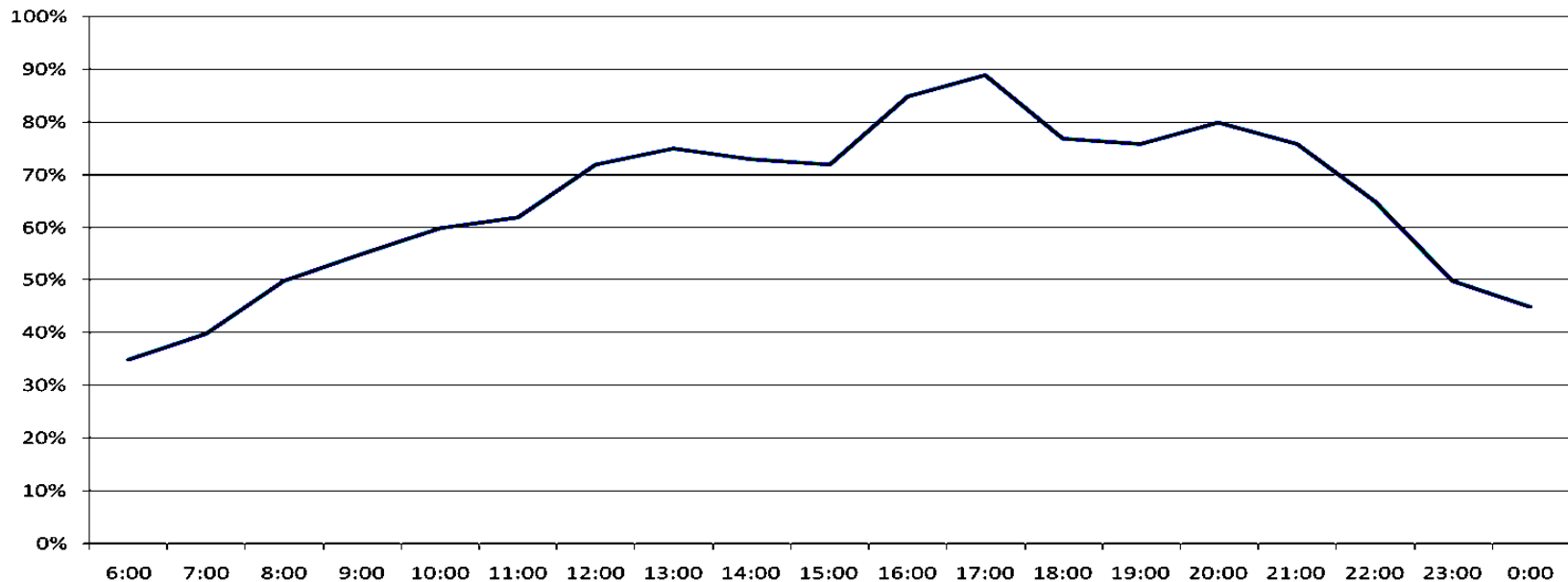
Morning type performance curve



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Evening type performance curve



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Why do we people fail to keep deadlines

- Deadline is unrealistic and it is not worth to try to fulfill
- Work is inadequately planned
- Person responsible is not able to start with the tasks (does not know how)
- Person responsible does not get adequate support when needed



Time thieves / Time wasters



- Interruptions (phone calls, visits, questions),...
- Poor delegation
- Unnecessary meetings
- Inadequate exchange of information
- IT problems
- Lack of personal/organization planning



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Time thieves /Time wasters

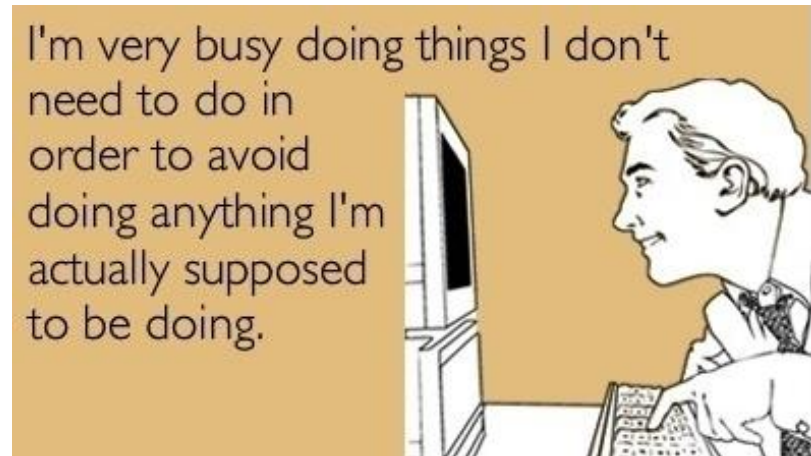
- Clutter and disorganization
- Procrastination
- Unnecessary checking work of others
- +



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- **Procrastination** - *(from latin's "procrastinare", that translates in to : the prefix pro-, 'forward', and suffix -crastinus, 'till next day' from cras, 'tomorrow')* is the avoidance of doing a task that needs to be accomplished.
- Sometimes, **procrastination** takes place until the "last minute" before a deadline.





Typical reasons for procrastination:

- The task is out of comfort zone – anxiety
- Lack of motivation
- The task is not challenging enough
- Lack of knowledge / skills how to do it
- Perfectionism
- Laziness



How to fight it:

- Admit that you are procrastinating
- Find out the real reason behind it
- Plan ahead for those tasks you do not “like”
- Take regular but controlled breaks
- Notice, that many times the tasks you have been avoiding turned out to be much easier than you had predicted
- Break down the task to smaller parts
- Set your own deadline if the task is missing one
- Reward yourself after finishing the task



Time management techniques



- Todo lists and master list
- Calendar
- Short term to long term planning
- Eisenhower technique
(importance VS urgency)
- 80/20 Pareto rule
- Planning for unforeseen tasks
- Dealing with interruptions



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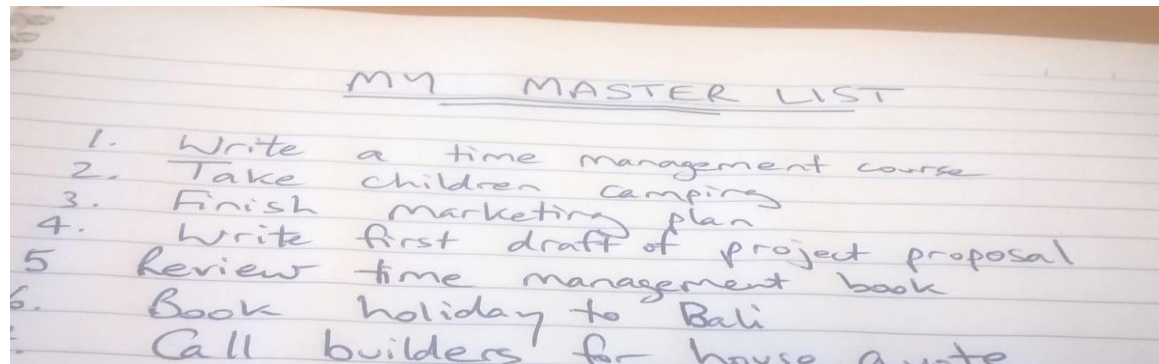
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To do lists and master list



Do you feel overwhelmed with what you have to do? Keeping a mental list of what you need to do can be draining!

A master list is essential to capture all of your tasks in one location. Rather than keep your tasks in your head...or for that matter on different scraps of paper....a master to do list allows you bring all your tasks into once central location.



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To do lists and master list



A Master List Needs to Be:

- Accessible at all times
- Within easy reach
- Easy to edit



“What object is always with me?” In most cases, it will be a diary or mobile phone.



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To do lists and master list



1. Capture everything in your master list

- Think of all the stuff that you need to do your horizon and start to list them down. Don't apply filters to what you need to do.
 - don't hold onto any judgement about them,
 - don't group into personal or work or
 - don't determine what are short or long tasks.
 - just try to **brain dump** everything.

2. Go through you papers on your desk and extract any actions that are sitting in these

3. Review your calender over the past 2 weeks to write down any actions that you **committed to** but did not complete!



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To do lists and master list



4. **Look into the future of your calendar** for any actions that you have committed to and that may require preparation.
5. **Create your daily to do list** - keep it short, so you don't become overwhelmed, but at the end of the day feel like you have been successful.

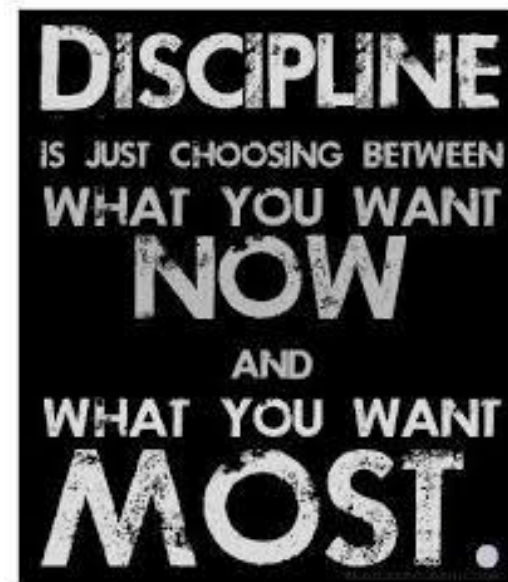


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Many people lose focus of their long-term goals. They have a difficult time seeing how everything they do today will bring them one step closer to their goals tomorrow. That is the reason why we need to learn to plan and get focused more on short term goals.



From long term to short term planning

1. Start with creating a master list (see above)
2. Define your goals
3. Define steps to reach your goals
4. Divide them into smaller activities
5. Estimate the time needed to accomplish the activities + deadlines if there are any
6. Gather information about the resources you will need / where you will need the help of others



From long term to short term planning



DAILY PLANNING

- Create a task list the day before
- Maximum of 7 tasks for a day (consider their duration)
- Decide the priorities
- Block your most productive time of the day for the priorities
- Plan for maximum of 60% of your time (the rest is reserve mostly for operative or other unforeseen tasks)
- Work on your tasks one after another
- Group alike or stereotypical tasks (like emails, phone calls, bills, etc.)
- Try to learn to estimate your working pace and your abilities
- Consider what could be delegated
- Review your plan against the reality and learn from it for the next time



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From long term to short term planning



WEEKLY PLANNING

- Create a task list at the end of the previous week
- Do not plan details
- Review your last weeks accomplishments and failures

MONTHLY or LONGER TERM PLANNING

- Focus on the big picture and the most important aspects, projects
- Try to have the real time frame
- Talk to your boss about your priorities
- Plan the long time ahead events such as conferences, holidays, etc.



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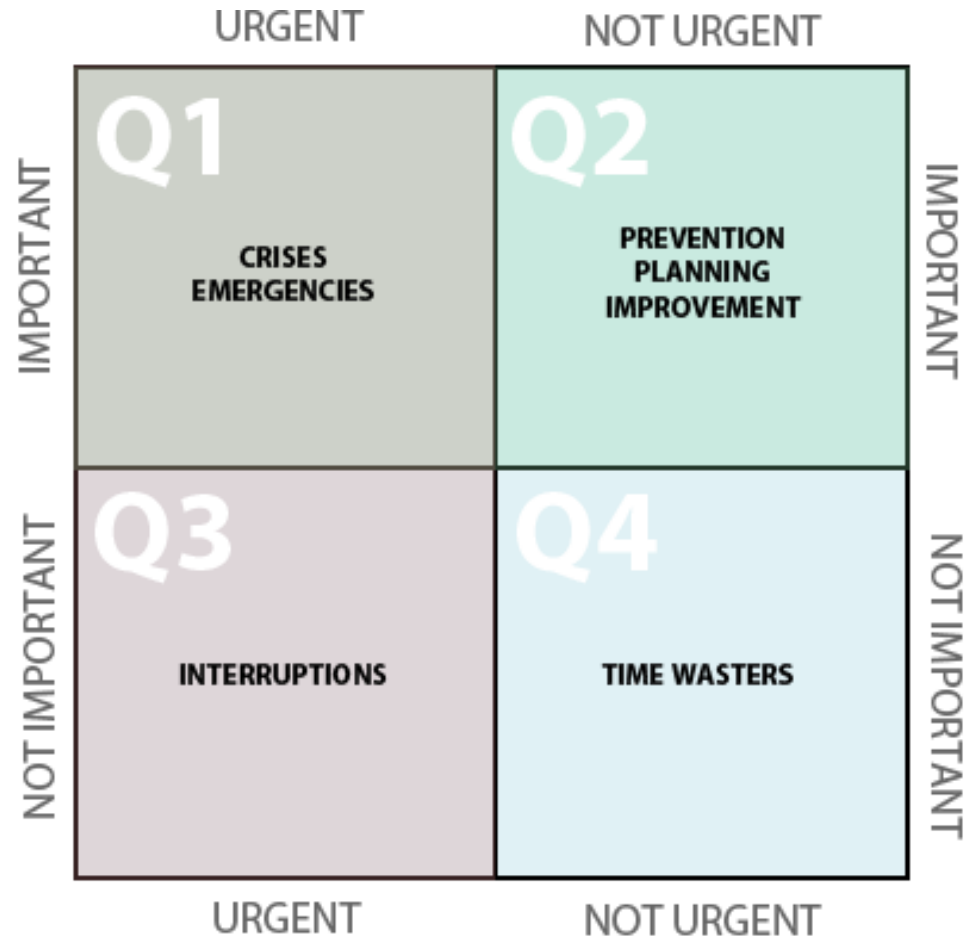
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Eisenhower Technique



ABCD technique
also known as
Eisenhower principle

**“THE MOST
URGENT
DECISIONS
ARE RARELY
THE MOST
IMPORTANT
ONES.” ~
DWIGHT
EISENHOWER**



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The Difference Between Urgent and Important

- **Urgent** means that a task requires immediate attention. These are the to-do's that shout "Now!" Urgent tasks put us in a reactive mode, one marked by a defensive, negative, hurried, and narrowly-focused mindset.
- **Important** tasks are things that contribute to our long-term mission, values, and goals. Sometimes important tasks are also urgent, but typically they're not. When we focus on important activities we operate in a responsive mode, which helps us remain calm, rational, and open to new opportunities.



**“Anything becomes urgent if
you wait long enough.”**

Danny Cox



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Quadrant 1 (A): Urgent and Important Tasks

- Tasks are both urgent and important. They're tasks that require our immediate attention and also work towards fulfilling our long-term goals and missions in life.
- Typically consist of crises, problems, or deadlines.
- **Examples:**
 - Certain emails (could be a job offer, an email for a new business opportunity that requires immediate action, etc.)
 - Term paper deadline
 - Tax deadline
 - Wife in emergency room
 - Car engine goes out
 - You get a call from your kid's principal saying you need to come in for a meeting about his behavior



Quadrant 2 (B): Not Urgent but Important Tasks

- Activities that don't have a pressing deadline, but nonetheless help you achieve your important personal, and work goals as well as help you fulfill your overall mission as a man.
- Typically centered around strengthening relationships, planning for the future, and improving yourself.
- **Examples:**
 - Long-term planning
 - Family time
 - Reading life-enriching books
 - Taking a class to improve a skill
 - Spending time with a rewarding hobby
 - Studying
- **We should seek to spend most of our time on Q2 activities, as they're the ones that provide us happiness, fulfillment, and success.**





Quadrant 3 (C): Urgent and Not Important Tasks

- Activities that require our attention now (urgent), but don't help us achieve our goals or fulfill our mission (not important). Most are interruptions from other people and often involve helping them meet their own goals and fulfill their own priorities.
- Examples:
 - Phone calls, text messages, most emails (some emails could be urgent and important)
 - Co-worker who comes by your desk during your prime working time to ask a favor
 - Request from a former employee to write a letter of recommendation on his behalf
 - Mom drops in unannounced and wants your help with a chore
- Many people spend most of their time on Q3 tasks, all the while thinking they're working in Q1. Because Q3 tasks do help others out, they definitely *feel* important. Plus they're also usually tangible tasks, the completion of which gives you that sense of satisfaction that comes from checking something off your list.





Quadrant 4 (D): Not Urgent and Not Important Tasks

- Those activities. Q4 activities aren't pressing nor do they help you achieve long-term goals or fulfill your mission as a man. They're primarily distractions.
- Examples:
 - Watching TV, Mindlessly surfing the web, Playing video games
 - Scrolling through Facebook, Twitter, Instagram
 - Shopping sprees
- You do not need to eliminate Q4 activities altogether from your life. After a particularly hectic day, watching a favorite TV show for a half hour is exactly what my brain needs to decompress.
- Instead of aiming to completely rid yourself of Not Urgent and Not Important tasks, try to only spend a very limited amount of time on them. 5% or less of your waking hours is a good goal.



Methodological tool

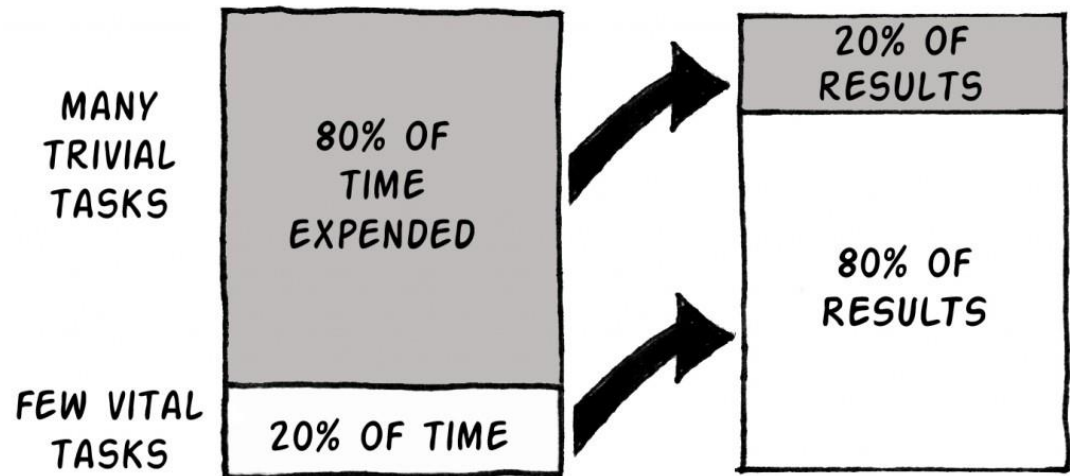
- ABCD matrix
- EUPANEXT_LO_090_M_001



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The Pareto principle* states that, for many events, roughly 80% of the effects come from 20% of the causes.



*also known as the 80/20 rule, the law of the vital few, or the principle of factor sparsity





Focus on less but more important tasks!

- **EFFECTIVENESS** – doing the right things
- **EFFICIENCY** – doing things the right way

DO THE RIGHT THINGS THE RIGHT WAY

**Nobody
is too busy,
it's just a
matter of
priorities.**
KUSHANDWIZDOM

The trick for you is to identify your 20%. This is where you exercise Choice. Choice is critical to the KNOW it part of Know it Plan it Do it.



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How to plan for unforeseen tasks



**Plan for maximum of 60%
of your time**

**reserve the rest for operative or
other unforeseen tasks or time
delays**



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How to deal with interruptions



1. Keep An Interrupters Log

- This is a simple record of the interruptions you experience in the course of a day.

2. Analyze and Conquer Interruptions

- firstly look at whether the interruption is valid or not, if not, deal with this politely but assertively
- next, look at how urgent the interruptions were, and whether they could have been pre-empted.
- from your Interrupters Log, you'll see how much time is taken up by these urgent, valid interruptions. Block this time into your schedule as "contingency time", and only take on as much other work as you can fit into the remaining time.

3. Put Your Phone to Work for You (Not Against You)

- A little bit of planning can go a long way in working to control telephone interruptions, which many people experience all day long. If you are on a deadline or your focus needs to be intense (and not interrupted), use your voice mail to screen calls. This way, you can deal with calls by priority, and at times that suit you. In fact, this telephone time can be planned into your schedule, and so become a normal part of your working day.



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How to deal with interruptions



4. Catch Your Breath

- When interrupted, it's easy to get caught up in the "rush" of the person who is interrupting, for they undoubtedly feel their request is urgent. Take a few minutes to consider the situation.

5. Learn to Say "No"

- It's often acceptable to say "no" to requests or tasks if you are busy when someone else can handle it, if it is not an important task, or if it can be done later.
- When this is the case, saying "no" in a courteous and sincere way, followed by a short explanation is the best course of action to take: "I am working against a very tight deadline on an important project right now so, I am sorry, but I can not jump in and help".

6. "Available" and "Unavailable" Time

- Let people know when you are available. and when you are not. Make sure that people know that during your "unavailable time", they should only interrupt you if they have to.

7. Uncontrollable Interruptions

- Most people are happy to schedule a more convenient time, but when this does not work, quickly set the parameters by saying something like, "I only have five minutes to talk about this right now," and stick to it.



Always remember, that you are responsible for the completion of your own tasks according to agreed standards and deadlines.



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The Two-Step Time Management Rule:

1. Plan your day to achieve your goals.
2. Keep to your plan.

Tips for Success,
Dale Carnegie Training



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- Review Question 1
 - List the main time management techniques
- Review Question 2
 - Explain the difference between goals and activities
- Review Question 3
 - Explain the ABCD technique for prioritization of tasks



- **Basic principles of time management:**
 - Effective Planning
 - Setting goals and objectives
 - Setting deadlines /scheduling
 - Delegation of responsibilities
 - Prioritizing activities as per their importance
 - Spending the right time on the right activity decision-making;
- **Plan for maximum of 60%**
of your time and reserve the rest for
operative or other unforeseen tasks or
time delays



Well Done!

You have completed this unit



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