



Sarah Simpson

# Daily Planning

Strategies For Ultimate Success

Sarah Simpson

# **Daily Planning**

## Strategies For Ultimate Success

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Daily Planning: Strategies For Ultimate Success

1<sup>st</sup> edition

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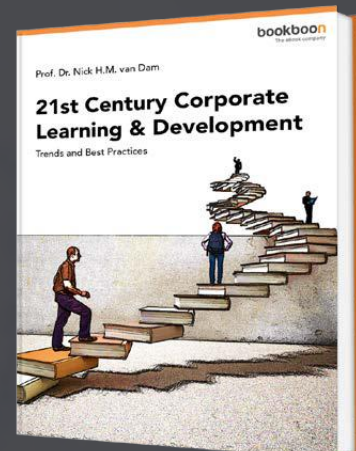
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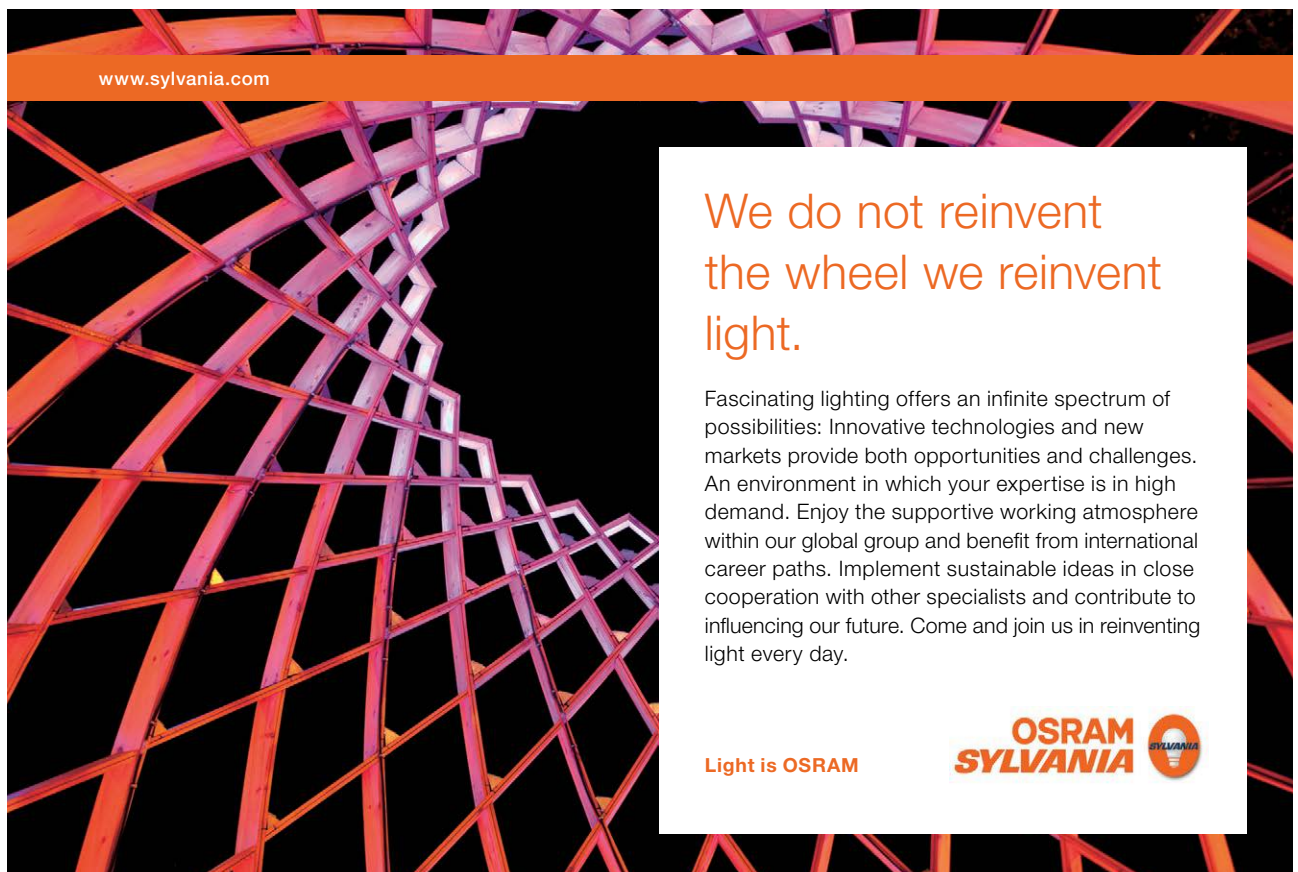
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# 1 Introduction

Welcome to this book on daily planning: strategies for ultimate success.

So, why might you need or want to daily plan? Well, in my experience there are 6 main reasons:

- your having 'to do more with less'
- there is increasing workload and pressure
- there is pressure to work in new ways
- your balancing a greater number, or more complex tasks
- you have a feeling of being inundated
- your struggling or never getting to the end of your 'to do list' – resulting in an ever growing list, taking tasks home or extending your working day

As a result you want to take back control and feel that you're on-top of things and have breathing room. This means that you can give yourself space to develop rather than just survive.

In this book we will be looking at 13 main topics or areas:

1. where are you currently? – let's take stock of what you do and when
2. time stealers or pirates
3. procrastination and why you really put things off
4. meetings
5. interruptions
6. emails
7. fixed tasks
8. urgency vs. importance
9. to-do-lists
10. prime and down times
11. saying "no" and "yes"
12. bringing it all together
13. an action plan for success

Daily planning is a topic I have written about and lectured on for many years, to both individuals and as part of a wider organisational initiative to increase team, departmental and organisational effectiveness. I know these strategies work because I've seen it do so time and time again. That said, its not easy, at least in the beginning. You are trying to fundamentally change the way you have done things and this could have been your approach for many years. But please, bear with me and the action plan we'll develop together as we go along will pay huge dividends in the end. You'll feel; more in control, less negative and swamped by the sheer volume of your tasks, less stressed and more able to concentrate on the positive elements of your day and your development.



## 2 Critical Reflective Learning – Part 1

Please complete the baseline questions below. They are a crucial part in your critical reflective learning process and practice and they will show you how far you have come by the end of this book.

1. Do you currently have a daily planning strategy?
2. If you do is it robust enough to enable you to complete tasks within your desired time frame?
3. Do you have concerns that introducing daily planning will make your day too rigid?
4. Have you ever undertaken a 2 week dairy challenge?
5. What are you wanting to get out of this book?
6. Do you believe it is possible to undertake the same days tasks but in a more effective manner?
7. What has prompted you to read this book?

### 3 The two week challenge

When I teach daily planning as a face-to-face course I ask students & delegates to write a 2 week daily activity planner, prior to us meeting. The reason for doing this is that we all, whether we mean to or not, will be unable to recall accurately what we actually did, when and for how long if it is done retrospectively.

I liken this to a food diary when you are trying to loose weight. If you ask someone to remember what they ate yesterday or last week they probably won't remember accurately!

Whereas, if you keep a diary at the time, your recall is clearly much improved.

Also I have found that the process of writing everything you do down can be very revealing in itself.

OK, so I can hear some of you now shouting at me saying *'I've already got enough to do without this!'* but please believe me when I say it is a crucial step in successful daily planning.

I have put a sample 2 week daily activity diary below, which you should adapt as required. I have split my template into 15 minute slots to encourage you to record as accurately as possible.

### 3.1 2 week challenge template

| Time  | Activity / notes |
|-------|------------------|
| 08:00 |                  |
| 08:15 |                  |
| 08:30 |                  |
| 08:45 |                  |
| 09:00 |                  |
| 09:15 |                  |
| 09:30 |                  |
| 09:45 |                  |
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| 15:45 |                  |
| 16:00 |                  |
| 16:15 |                  |
| 16:30 |                  |
| 16:45 |                  |
| 17:00 |                  |

## 4 Setting the Scene

As I said in the introduction there are 6 main reasons why you might decide to plan on a daily basis. As a recap for you, these were:

- having to do more with less
- increasing workload and pressure
- pressure to work in new ways
- balancing a greater number, or more complex short and long term tasks
- feeling inundated
- struggling or never getting to the end of your to do list
- wanting to take back control

How many of these relate to you? In practice you'll probably find it's a combination and these may change depending on the situation or environment you find yourself in.

If we know why you want to plan the next logical thing to do is find your current vs desired state. In other words where are you now vs where you would like to be and you'll sometimes hear this process called 'gap analysis'.

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I was a construction supervisor in the North Sea advising and helping foremen solve problems

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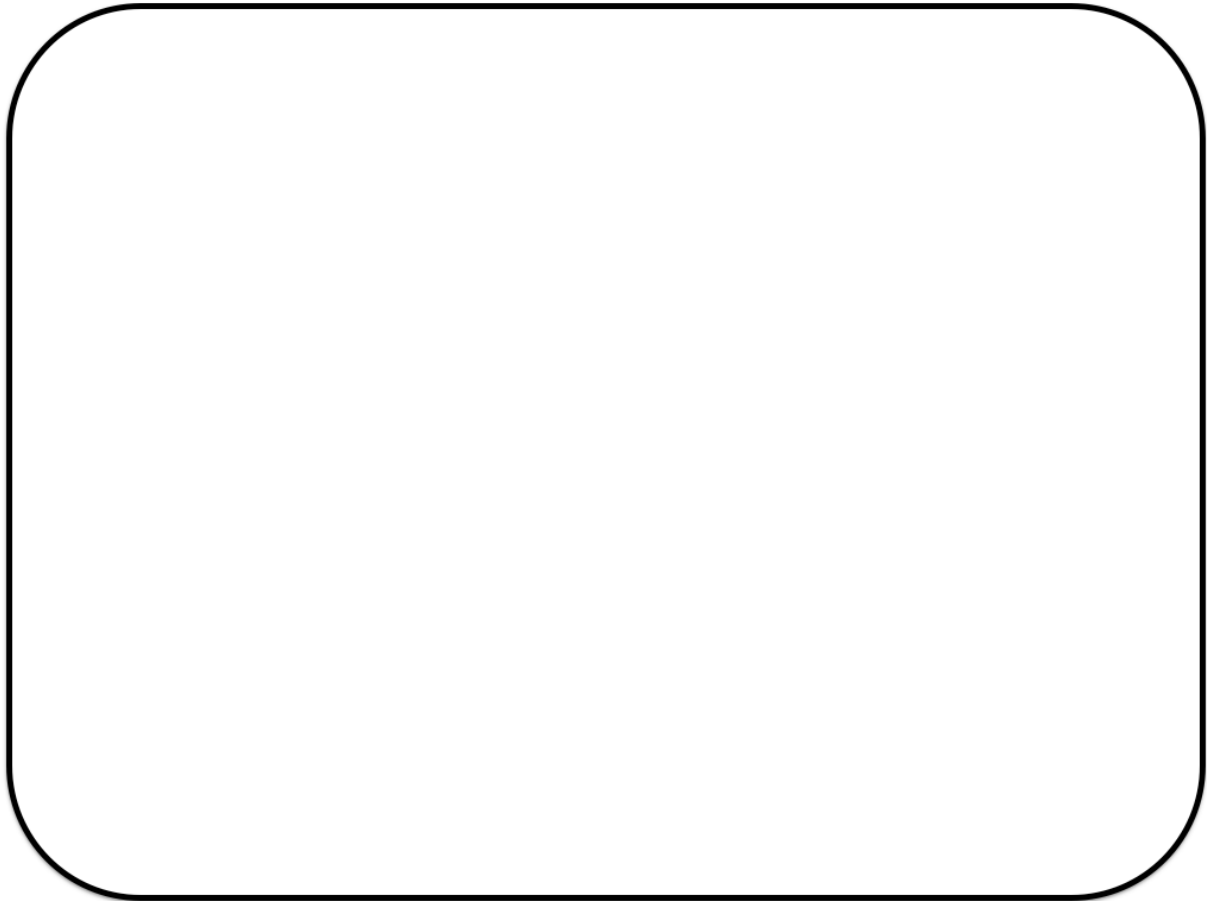




## 4.1 Current vs. desired state

In this part of the book we need to look at where are you now vs where you want to be.

Take a moment to think about and record how your current strategy or lack of daily task accomplishment makes you feel?

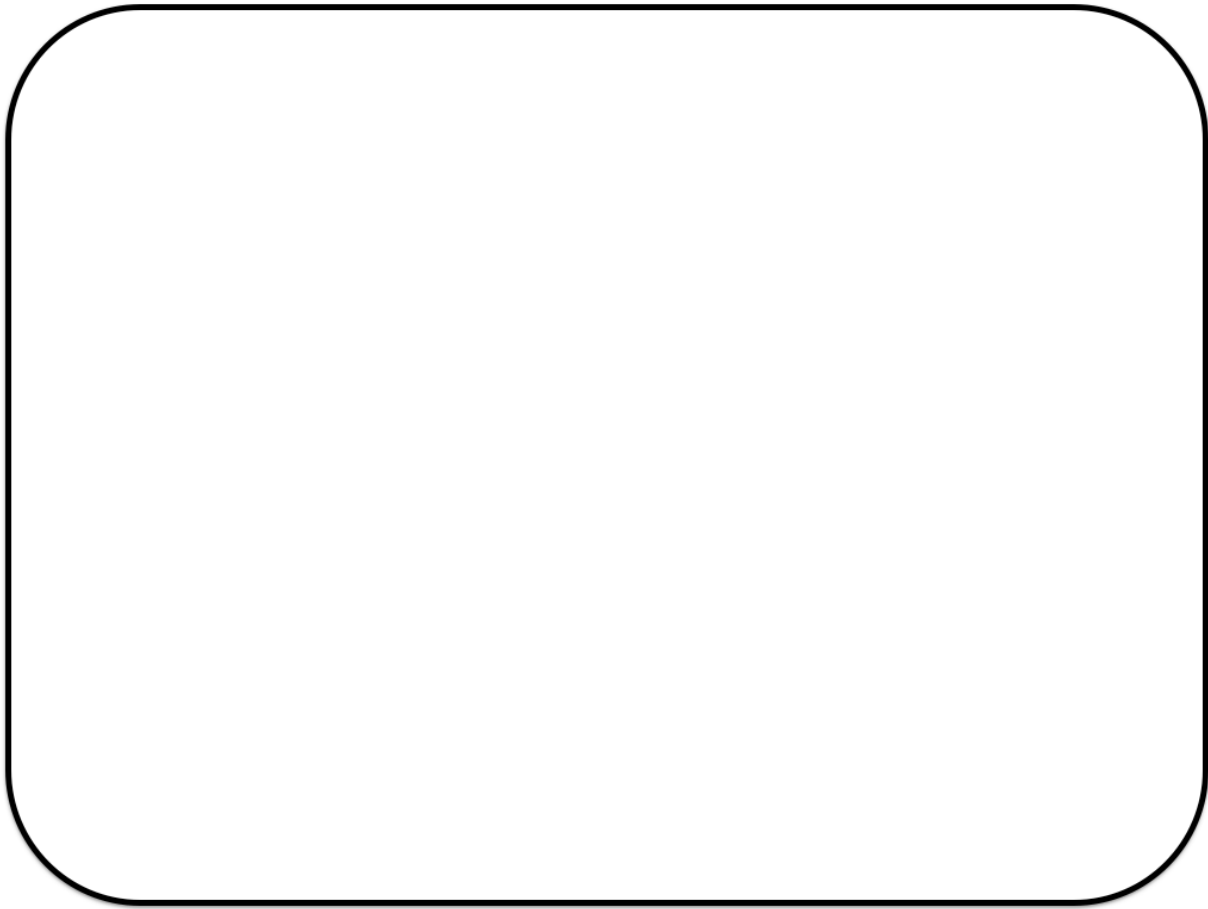
A large, empty rounded rectangle box with a black border, intended for the user to write their current state.

Current state

Previous experience has shown me that the following phrases and feelings are common:

- out of control
- swamped
- on a treadmill I can't get off
- feeling that there must be a better way
- wanting to be more efficient and effective
- wanting a more logical structure or approach

Now ask yourself how would you like to feel? and again take a moment to think about this.



Desired state

Remember I said earlier how the process of planning and changing the way you structure your day can initially be challenging and it may seem easier just to give up and go back to the way you've always done things. If you keep in mind how you want to feel, you can use this as your inspiration to get over any challenges or doubts you may have.

Common reactions to how you would like to feel are:

- in control
- having room to breathe
- being able to look forward
- having time and space to develop thoughts and yourself as an individual
- feeling truly efficient & effective
- using your time wisely or smartly

## 4.2 Current vs desired state word clouds

With my previous students I have produced 'word clouds' to show their feelings towards their current position and how they would like to feel if they had a great daily planning strategy.



Current state

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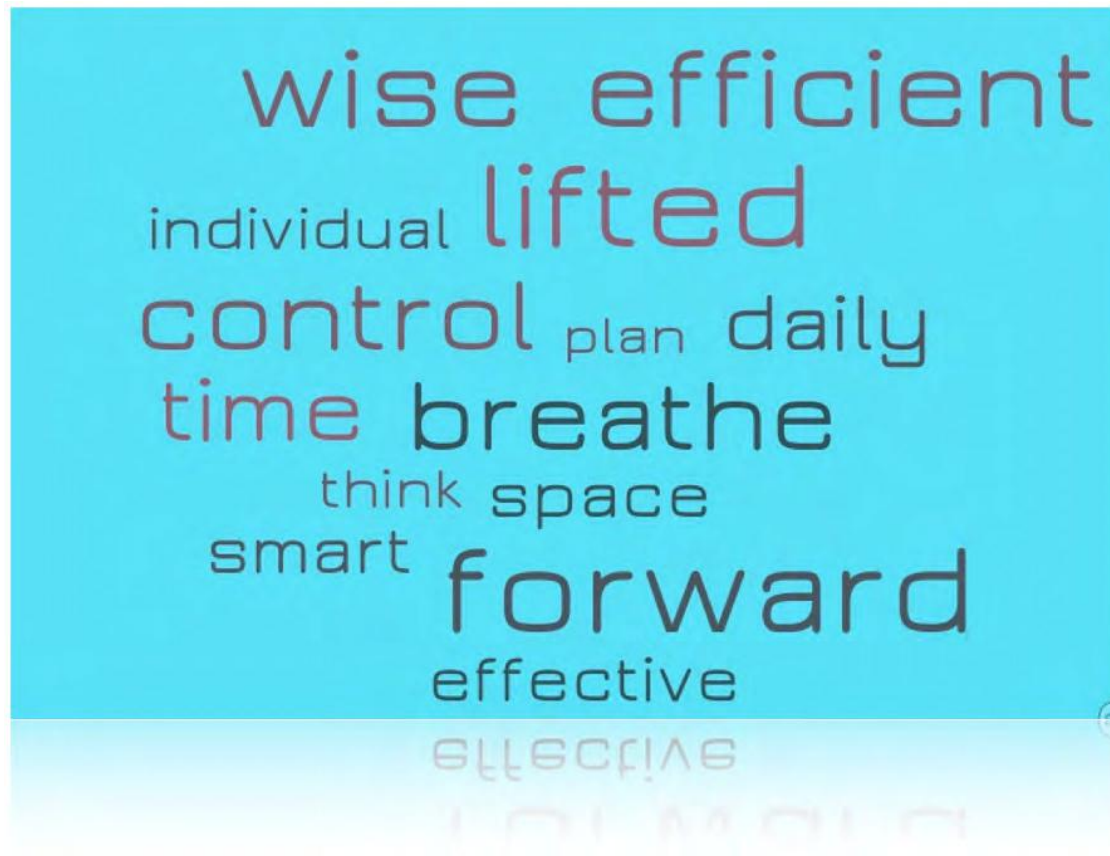
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**Desired state**

If you would like to create your own cloud, or even link with work colleagues to create a joint one then you could use this information to give you even more impetus to change.

## 5 Thieves and Pirates

Time pirates or time stealers are what we call the things you do which:

- are not important
- are not enjoyable
- draw your attention away from important activities

By identifying these you can work on a plan to tackle them and lessen their impact.

### 5.1 Your time pirates

Please complete the following table, in which you will identify your time pirates and make a note of anything you initially think you could do to lessen their impact.

If you are struggling to make your list you may find that your time pirate tasks are those that you leave until the very last minute or you repeatedly carry over to the next day.

| time pirate | potential action plan |
|-------------|-----------------------|
|             |                       |
|             |                       |
|             |                       |
|             |                       |
|             |                       |
|             |                       |
|             |                       |
|             |                       |

Common daily pirates that you may have identified, although of course everyone is unique are:

- interruptions
- poor personal organisation
- poor planning
- lack of focus
- lack of motivation
- doing work that isn't yours
- procrastinating
- meetings
- the absence of others
- perfectionism
- not knowing what to do
- having unclear objectives

So, let's take each one of these in turn and examine them in greater detail. I will also put a table of these at the end of the section (section 5.3) so you can see all 11 at a glance.

"I studied English for 16 years but...  
...I finally learned to speak it in just six lessons"

Jane, Chinese architect

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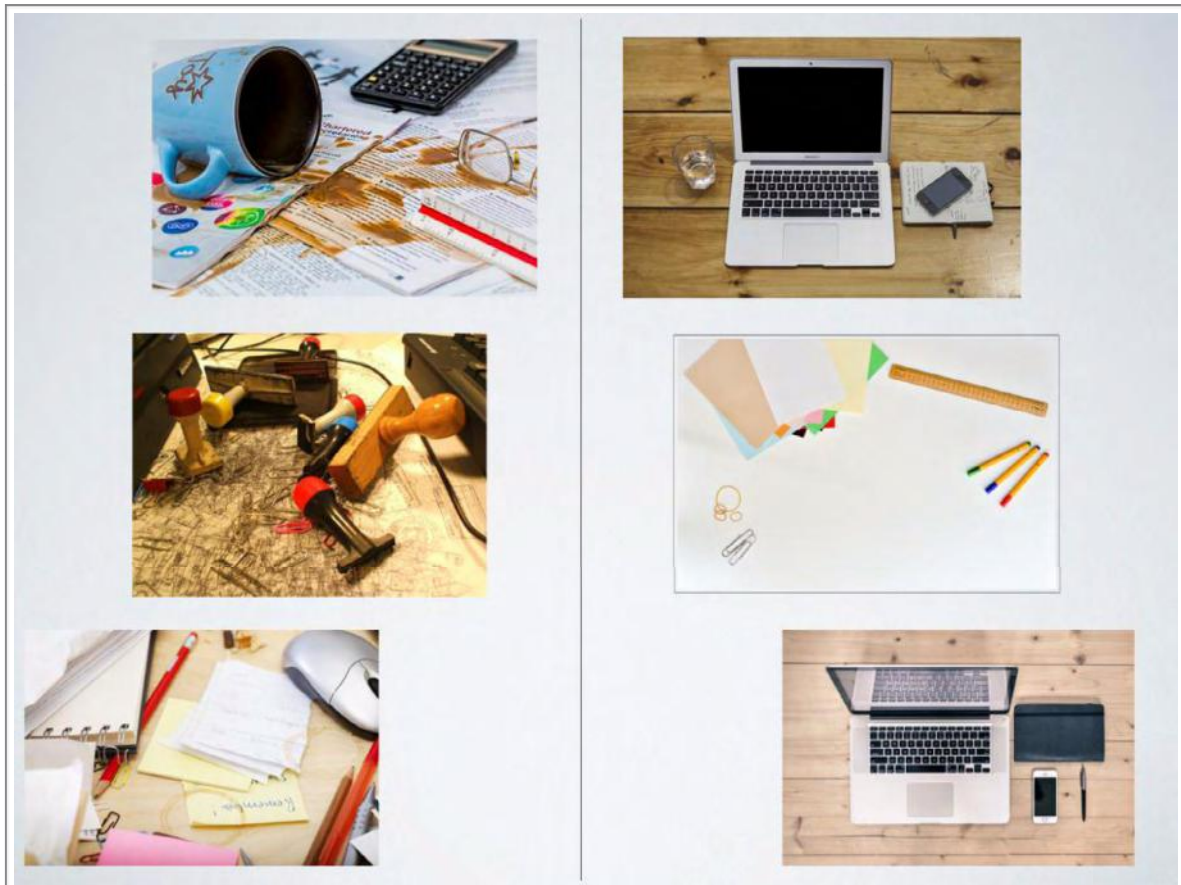


### Number 1 – interruptions

These could be from internal or external sources and two of the most common interruptions are telephones and people dropping by and in chapter 8 we will look at both of these in greater detail. So I'll put this to one side for the time being.

### Number 2 – poor personal organisation

Ask yourself, which side of this image looks like your desk? is it cluttered, or organised?



Clearly the more organised you are, with good processes for dealing with items coming in and going out, the more effective and efficient you will be. And dealing with paper is something that we will cover in greater detail later on in Chapter 8.

### **Number 3 – poor planning**

Even though this book is looking at daily planning, you should always be thinking about short, medium and long term planning strategy. Each one of these elements should be mapped using the SMART or as we now SMARTERS. acronym. As a recap, or if you are unsure, **SMARTERS** stands for:

**S**pecific

**M**easurable

**A**chievable or attainable

**R**ealistic or relevant

**T**imely

**E**valuate, ethical or extending

**R**e-evaluate or rewarding

**S**trategic – this could be personally strategic or organisationally so

What I will do is put an expansion of each of these elements at the end of this chapter in section 5.2.

### **Number 4 – a lack of focus or motivation**

Do you see a task through to completion or enjoy starting something and then get distracted by something else? Having multiple short tasks on the go decreases focus and efficiency.

### **Number 5 – doing work that isn't yours**

Clearly there will always be time when you will do tasks that are not strictly within your remit. The issue comes when you have no room for manoeuvre within the day and you are unable to say “no”.

How to say ‘no’ and indeed ‘yes’ will be something we’ll look at in chapter 14, as it is something many of my students ask me about and causes them concern.

### **Number 6 – this is the big one...procrastination!**

Procrastinating or putting something off is such a big deal and it negatively impacts on your whole day. Because of this I have given it its very own chapter – chapter 5.

### **Number 7 – meetings**

Love them or hate them meetings are a notorious time stealer. In chapter 7 we will look at some key tactics for getting the most out of meetings and these are things that my students have put into place that have worked to great effect.

### **Number 8 – the absence of others**

If you work closely with others and there is no policy for dealing with absence then you may end up having your daily schedule annihilated.

Don't forget absence can fall into two categories; planned – so things like holidays, study leave and unplanned like sickness and family emergencies. It would be extremely beneficial to develop a policy for dealing with absence, if you have not done so already.

### Number 9 – perfectionism

Do you find yourself getting caught up in the minutiae of a task? If so, you may be suffering from perfectionism and this approach can also be seen in procrastination as it is a way of putting off doing something else. If the task you spend too long on is one that you like doing it can be really easy to convince yourself that an excessive length of time is necessary and justified.

### Number 10 – Not knowing what to do

Do you have the skill and ability to do a job? If not can you share the workload, or set up a coaching and mentoring program with colleagues to help each other out?

If you share your skills and experience you will all become more effective.

### Number 11 – having unclear objectives

Not knowing what to do means you don't know if you are doing things correctly or when you have reached the end of your objective. If you are a manager you can ensure your team do not feel unsure as to what is expected of them. If you yourself are uncertain, please ask for clarity about what and how you are doing a task.

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## 5.2 Smarters

|   |                         |   |
|---|-------------------------|---|
| S | Specific                | <p>The first term stresses the need for a specific goal over and against a more general one. This means the goal is clear and unambiguous; without vagaries and platitudes. To make goals specific, they must tell a team exactly what is expected, why is it important, who's involved, where is it going to happen and which attributes are important.</p> <p>A specific goal will usually answer the five "W" questions:</p> <ul style="list-style-type: none"> <li>• What: What do I want to accomplish?</li> <li>• Why: Specific reasons, purpose or benefits of accomplishing the goal.</li> <li>• Who: Who is involved?</li> <li>• Where: Identify a location.</li> <li>• Which: Identify requirements and constraints.</li> </ul>                                 |
| M | Measurable              | <p>The second term stresses the need for concrete criteria for measuring progress toward the attainment of the goal. The thought behind this is that if a goal is not measurable, it is not possible to know whether a team is making progress toward successful completion. Measuring progress is supposed to help a team stay on track, reach its target dates, and experience the exhilaration of achievement that spurs it on to continued effort required to reach the ultimate goal.</p> <p>A measurable goal will usually answer questions such as:</p> <ul style="list-style-type: none"> <li>• How much?</li> <li>• How many?</li> <li>• How will I know when it is accomplished?</li> </ul>   |
| A | Achievable / attainable | <p>The third term stresses the importance of goals that are realistic and attainable. While an attainable goal may stretch a team in order to achieve it, the goal is not extreme. That is, the goals are neither out of reach nor below standard performance, as these may be considered meaningless. When you identify goals that are most important to you, you begin to figure out ways you can make them come true. You develop the attitudes, abilities, skills, and financial capacity to reach them. The theory states that an attainable goal may cause goal-setters to identify previously overlooked opportunities to bring themselves closer to the achievement of their goals.</p>   |
| R | Realistic / relevant    | <p>Relevant goals (when met) drive the team, department, and organization forward. A goal that supports or is in alignment with other goals would be considered a relevant goal.</p> <p>A relevant goal can answer yes to these questions:</p> <ul style="list-style-type: none"> <li>• Does this seem worthwhile?</li> <li>• Is this the right time?</li> <li>• Does this match our other efforts/needs?</li> <li>• Are you the right person?</li> </ul>   |
| T | Timely / time-bound     | <p>The fifth term stresses the importance of grounding goals within a time frame, giving them a target date. A commitment to a deadline helps a team focus their efforts on completion of the goal on or before the due date. This part of the S.M.A.R.T. goal criteria is intended to prevent goals from being overtaken by the day-to-day crises that invariably arise in an organization. A time-bound goal is intended to establish a sense of urgency.</p> <p>A time-bound goal will usually answer the question:</p> <ul style="list-style-type: none"> <li>• When?</li> <li>• What can I do 6 months from now?</li> <li>• What can I do 6 weeks from now?</li> <li>• What can I do today?</li> </ul> <p>If there is no time frame, the objective is not SMART.</p> |



|   |                                |  |
|---|--------------------------------|--|
| E | Evaluate / ethical / extending | <p>Do your goals link with organizational corporate social responsibility (CSR)?</p> <p>How will you evaluate the path you are taking and its relevance in helping you reach your goals?</p> <p>You goals should be challenging enough to examine established practices and ways of working or make a contribution to HFRS's overall direction or plan</p> |
| R | Re-evaluate / rewarding        | <p>If your goal is a longer term one how will you continually evaluate its progress and relevance?</p> <p>How rewarding are your goals to you as an individual and to HFRS as a whole?</p>   |
| S | Strategic                      | How do your goals 'fit in' with your personal long term goal and the wider organizational strategic direction?   |

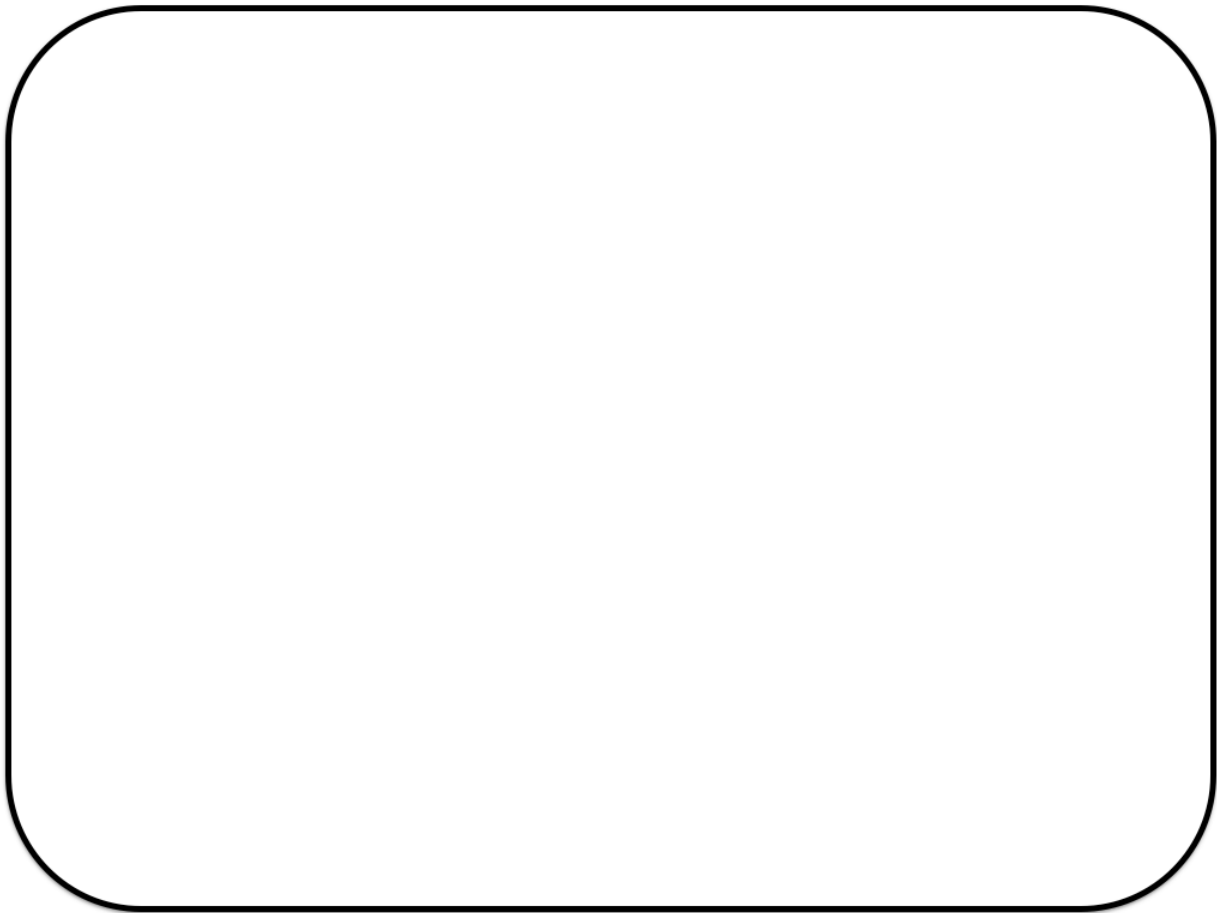
### 5.3 Pirates 'at a glance' table

| Time pirate  | Action  |
|--|---|
| Interruptions  | <p>Internal and external</p> <p>Telephones</p> <p>Can you divert to an answer phone then review and give a concise response</p> <p>Colleagues dropping by '<i>have you got a minute?</i>'</p> <p>Explain politely your busy and make sure you don't do the same</p> |
| Poor personal organization                           | <p>De clutter your desk</p> <p>Use a diary system for organization</p> <p>In / out tray system</p>  |
| Poor planning  | <p>Use long, medium and short term planning</p> <p>Be aware of the SMARTER rule</p>   |
| Lack of focus / motivation                           | Stick to a task and see it through. Having multiple short tasks on the go decreases focus and efficiency  |
| Doing work that's not yours                          | Delegate if possible if not ensure you have an open relationship whereby extra tasks are spread evenly or given to the person with the best skill base  |
| Procrastination (putting off work that is important) | <p>Eat your frog first and your elephant in pieces</p> <p>Don't put off the worst 'til last – do it first</p>   |
| Meetings   | Schedule, timing, matters to discuss, chaired and documented  |
| Absence of others                                    | Do you have a procedure for dealing with the absence of others  |
| Perfectionism  | Do you spend unnecessary amount of time on the minute details – this can be a form of perfectionism   |
| Not knowing what to do                               | <p>Do you have the skill and ability to do a job. If not can you share experience, coaching and mentoring with colleagues.</p> <p>If you share your skills you will become more effective</p>   |
| Unclear objectives                                   | Ensure you know what is expected of you and what isn't  |

## 6 Procrastination

In the last chapter we looked at time pirates and one of the big ones was procrastination.

What I would like you to do is make a list of why you put off doing things – please be as honest as you can.



Let's face it most of us are guilty of putting off something sometimes, but believe me, procrastination will negatively impact on almost every element of your daily productivity.

So, let's go back to the list you made above of why you put off doing something and it is likely that some or all of these reasons came up.

| Reason                | Description   |
|-----------------------|---|
| Fear of failing       | Our work will not be good enough  |
| Fear of change        | If we do a good job we might be given more or something harder  |
| Not in control        | We resent; the work, the time taken, the timescale or being told what to do   |
| Lack of understanding | We don't know how to do something, what is expected of us or how to start so we put it off  |
| Adrenalin             | Some people thrive on completing things with seconds to spare!<br>When I teach this subject people always laugh at this one but they can also think of a time this has happened or a colleague that has done this |

It's all very well having a list and indeed a description of why we put something off but the real question is how can we tackle the urge to put something off and lessen its daily impact?

## 6.1 Tackling procrastination

There are 6 main approaches to tackling procrastination and we'll look at each one in turn. In order to get the best of of this section you should relate these 6 approaches back to the list of why you put things off that **you** made at the beginning of this chapter.



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### **Number 1 – establish the reason**

Remember to be truly honest with yourself and ask yourself...

*“why do I really put this off”*

### **Number 2 – establish the importance**

Are you putting off essential tasks and concentrating on trivia. If so you need to refocus and prioritise.

### **Number 3 – break the task down**

Can you break large tasks down into smaller ones (we'll see how this is known as eating an elephant later). You can use your daily planner do this.

### **Number 4 – schedule**

Schedule time to tackle procrastination tasks.

Set realistic targets and make sure it is completed fully or it will drain your energy and sit there looking at you!

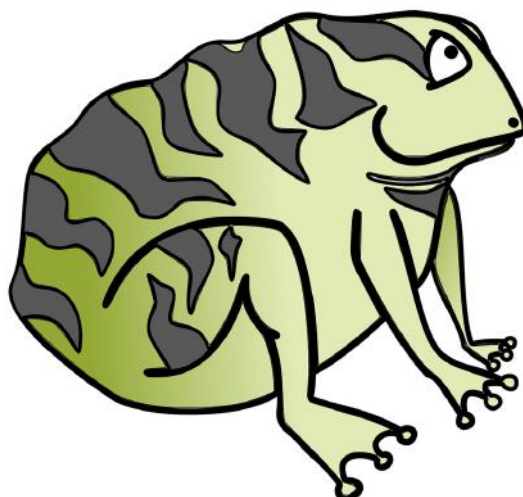
### **Number 5 – choose when to tackle the task**

Ensure procrastination tasks are done when you are 'freshest' or at your best. For some people this is early on in the day and for others it may be later. In chapter 12 we will look at this in more detail when we look at prime and down time.

### **Number 6 – just make a start**

Could it be that the thought of the task is actually worse than the reality?! Try scheduling half an hour and see how you feel.

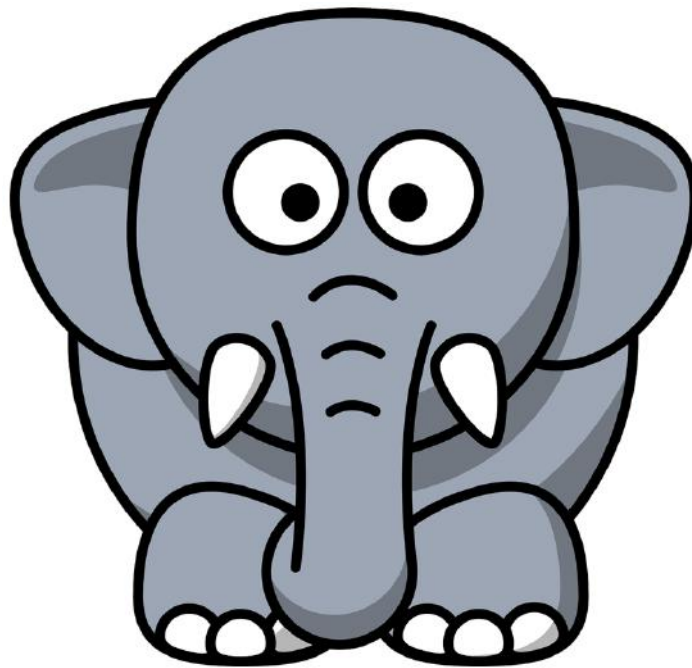
Tasks we put off or procrastinate over I like to refer to as 'ugly frogs'.



Mark Twain wrote that if you eat an ugly frog for breakfast then nothing that bad can happen again that day!

So, in this analogy if you know you've got a frog to eat at tea time it will effect your performance all day long.

The other analogy often used during time management, although I also use it in project management is the elephant.



If you had to eat an (obviously metaphoric) elephant it would be a daunting prospect and the only way to tackle it would be to break it down into smaller pieces. These then become more manageable and can be scheduled into your daily planner.

If analogies and visual cues work for you then you can do what some of my students do and put a picture of a frog and an elephant on their computers or tablets as a reminder!

# 7 Marvellous meetings

a) Meetings are notorious for impacting, both positively and negatively, on your daily workload.

How many meetings have you attended that have started and finished on time? Unless they have been well chaired then the number is likely to be quite low.

Ask yourself:

- what is the effect when 1 person is late?
- what is the effect if you overrun?

Now imagine that meeting is attended by 6 people. A 10 minute delay each adds up to a collective hours lost productivity as well as damaging resentment and damaged work relationships.

## 7.1 Marvellous meetings strategies

Luckily, there are a few simple strategies for making meetings more productive and meaningful.

- Set ground rules – This could be done by the chair, or in the case of a group who meet regularly you should consider getting them to set the ground rules. This means that if rules are ‘broken’ it is the group rules that have been undermined rather than an individuals.
- Ensure prompt start and finish times are adhered to – they’ll soon get the message! Some of my other students have tried not allowing people into a meeting after it has started. If you use this approach please make sure that everyone is aware that this is the case ahead of time.
- Make an agenda and stick to it. This should be sent out beforehand.
- If you are not chairing the meeting and there is a problem with start and finish times, ensure timekeeping is put on the agenda for the chairperson to address officially.
- If you have an any other business (AOB) category please ensure this is for urgent things only. It should not be a place to dump a whole host of trivia or other items.
- And lastly and most controversially, if there’s nothing to say don’t have a meeting! People look at me with absolute horror when I suggest this and they say things like

*“but we always have a meeting on a Monday morning”*

*“we can’t do that, it’s been like that for years”*

*“I’ve got it scheduled in my diary for the next year, so I can’t possibly change it!”*

Trust me – try cancelling meetings that are not needed and see what reaction you get, but I am willing to bet it will be a positive one!



## 8 Interruptions, interruptions, interruptions!

In this chapter we will look at three of the biggest and most impactful interruptions you face on a day-to-day basis; telephones, visitors and paper clutter (email has its own chapter – number 9).

### 8.1 Telephones

The telephone is undoubtedly one of our most important communication tools, but it can also be a big time waster.

Strategies for optimal telephone usage are:

- scheduling 'telephone time'
- grouping conversations together and planning in advance what you need to discuss / get across
- avoiding too much non-related conversation
- avoiding being put on hold – if someone isn't there call back
- leaving clear concise messages on answer phones



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When I have worked with teams rather than individuals we have been able to reach an agreement on how to deal with phone calls. For example, scheduling block periods of time to answer all phone calls freeing up others to have a period of time without any of these interruptions.

## 8.2 Visitors

The second interruption we'll look at is unexpected visitors

“do you have a minute?”

This phrase can soak up time like a sponge. In reality someones visit rarely takes just a minute and multiple interruptions not only eats into your daily time, but can also put you off your 'stride' or 'train of thought'.

Strategies for dealing with this are:

- Standing up when someone comes over to talk to you – this body language gives off a signal that you don't want to sit down and engage in a long conversation. This is the one thing that people report back to me as being the most effective method of limiting the impact of visitors.
- Establishing why they have come to see you quickly and deal with it, rather than starting with a prolonged period of general 'chit chat'.
- Not using it as an excuse to put a task off, especially if you are doing something you don't really like!

## 8.3 Paper

Paper clutter can be dealt with using the FAT attack approach.

**F** for File – store items for future reference

**A** for Act – read, reply, forward or follow up on items that require an immediate response

**T** for Throw – recycle or securely discard items you don't need

## 9 The 'zero inbox'

How would you feel if all of your emails were in logical folders and you could categorise new ones as they come in\*? The answer would probably be a mixture of relief and order.

But, how can you really tame your email? Let's face it we all receive an avalanche of emails throughout the day and how we respond to it can have a dramatic effect on our time management and efficiency.

So, here's how you can do it...

### 9.1 Checking your emails\*:

Firstly don't check every 2 minutes. By breaking off what you are doing and checking your email you place 30 minor interruptions per hour into your day. If you times this over an eight hour day that equals 240 interruptions per day!

So, what you need to do is check at set times during the day which you will schedule into your daily plan. Ok, so I can hear you saying, *"well that wont work for me because I can't miss an important message"*. The way to deal with this is if there are specific people who cant wait until your scheduled email time then allocate them a 'VIP' status and these emails will cut straight through to you.

Next set up your email to only receive messages at set times so you won't be tempted to get distracted and as I said earlier you can have a rule for vip addresses so they would come straight through to you.

Finally the rule that my students find to be fantastically successful is to turn off any audio and visual cues that you have mail. Think about it, even if you don't respond to a cue you will still have your train of thought or current task interrupted in some way.

### 9.2 Reading your emails:

- I suggest you use "The 2 Minute Rule" as described by David Allen – if the email will take less than 2 minutes to read and answer then do it there and then in your normal scheduled email time
- For emails that are longer and may require thought, compilation or attachment of documents you should schedule time for these on your to do list

Finally let's look at how you organise your email.

### 9.3 Organising email:

A 'zero inbox' is something many of us can only dream about but by using email folders and storing information in a logical, easily accessible format we become more efficient and less stressed.

We do this by setting up email 'rules' and you can do this within your settings. These rules will help you by automatically rather than manually sorting emails into folders. Say you have regular emails that you don't need to read and respond to, but you do need to keep for later referral, for example a newsletter or something similar. I get students to make a list of things that could fall under automatic folder sorting. At first they find this task really difficult, but after a group discussion or time to think that number becomes much greater.



Ask yourself what emails could you 'file' automatically?

# 10 PPPPP – Proper Planning Prevents Poor Performance

At this point we are going to bring together everything that we have covered in chapters 1–9 for a recap before moving on.

So far in this course we have:

1. undertaken or planned to undertake a 2 week daily diary
2. identified our time pirates
3. examined why we put things off and what we can do to tackle it
4. looked at meetings, telephones, visitors and clutter
5. seen the impact of emails

Now what we need to do is start to put all this knowledge into how you can plan on a day-to-day basis.

Daily planning is extremely effective in ensuring tasks are carried out in the right order and at the right time, but clearly the amount and method you chose is up to you. When done correctly it becomes quick and produces fast accurate results.



## 10.1 The stages

OK, lets go through the stages of effective daily planning step-by-step.

**Step 1** – ask yourself when is the best time to make your plan?

Some people find the last 5 minutes of the day is best and for others it might be the first 5 minutes of the actual day itself. Whichever time you choose, stick to it and ensure it becomes part of your daily routine.

When would be the best time to make your daily plan?.....

**Step 2** – identify your fixed time tasks

These are tasks which must be done at a certain time. They can not be moved and so this is time which is already accounted for.

What tasks would come under your fixed time?.....

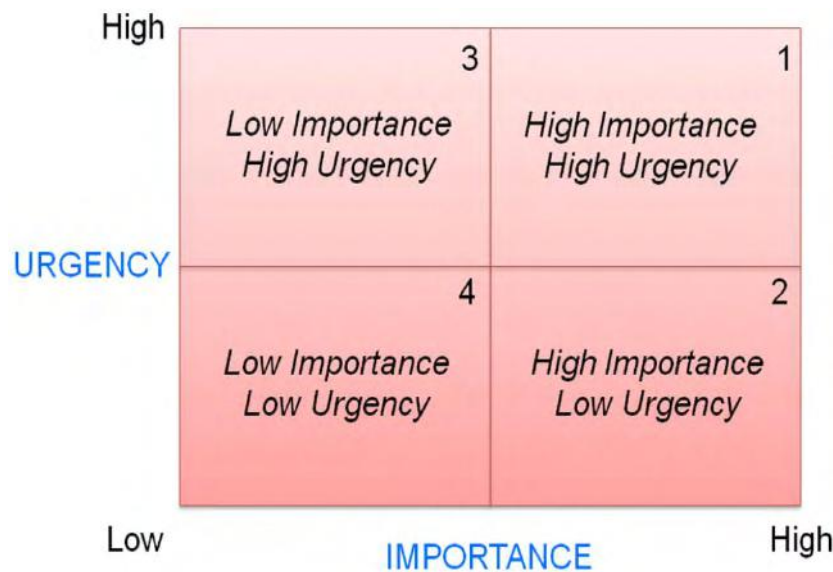
Remember fixed time tasks are not ones you have always done at a certain time, they are ones which can not be moved.

**Step 3** – what's left?

OK, so you've identified your fixed tasks, now you have to identify what tasks are left and rank these in order of importance.

The way we are going to do this is by using the urgency – importance method.

### 10.1.1 the urgency – importance method



As you can see this grid ranks your **non-fixed** tasks in order of urgency and importance and places them in one of 4 categories.

If you are not in full control of your activities, you will tend to spend most of your time in box 1 and we call this the **emergency zone**. This is a highly stressed environment and is not a healthy place to spend too much time in. Everything in this box is rushed and hurried and can result in higher levels of stress.

You should aim to spend most of your time in box 2. In other words, working on high priority tasks that are timed to manage the deadlines.

Examples of urgent, but not really important tasks are found in box 3. These include, quick and simple tasks and interruptions. To the interrupter they may seem important, but this doesn't necessarily mean they're important to you. If you spend too much time dealing with tasks that are important to others, you won't have enough time to allocate to your own important activities. Try to minimise the time spent in this box as it adds little value to your key result areas.

Finally, let's look at box 4. Sometimes we find ourselves doing things that are not urgent and not important. And examples of these include tasks you like to do like or get some sense of comfort from. There is something to be said for doing things we enjoy that are unimportant, but only occasionally. When they take up too much time they become a problem.

Let's not forget that ranking your tasks is not an easy thing to do but it is absolutely crucial in good planning and carrying out tasks in the timely manner, whilst ensuring everything gets completed.

Here's an importance – urgency grid which I've filled in which will help you. Remember the zone where you will find greatest success is 2 because this is where you will find development and self determination.

|                   | Not - Important   | Important  |
|-------------------|---|--|
| <b>Urgent</b>     | <b>3 REJECT AND EXPLAIN</b> <ul style="list-style-type: none"> <li>trivial requests from others</li> <li>apparent emergencies</li> <li>ad-hoc interruptions and distractions</li> <li>misunderstandings appearing as complaints</li> <li>pointless routines or activities</li> <li>accumulated unresolved trivia</li> <li>boss's whims or tantrums</li> </ul> <p>Scrutinise and probe demands. Help originators to re-assess. Wherever possible reject and avoid these tasks sensitively and immediately.</p> | <b>1 DO NOW</b> <ul style="list-style-type: none"> <li>emergencies, complaints and crisis issues</li> <li>demands from superiors or customers</li> <li>planned tasks or project work now due</li> <li>meetings and appointments</li> <li>reports and other submissions</li> <li>staff issues or needs</li> <li>problem resolution, fire-fighting, fixes</li> </ul> <p>Subject to confirming the importance and the urgency of these tasks, do these tasks now. Prioritise according to their relative urgency.</p>                     |
| <b>Not-Urgent</b> | <b>4 RESIST AND CEASE</b> <ul style="list-style-type: none"> <li>'comfort' activities, computer games, net surfing, excessive breaks</li> <li>chat, gossip, social communications</li> <li>daydreaming, doodling, over-long breaks</li> <li>reading nonsense or irrelevant material</li> </ul> <p>Habitual 'comforters' not true tasks. Non-productive, de-motivational. Minimise or cease altogether. Plan to avoid them.</p>  | <b>2 PLAN TO DO</b> <ul style="list-style-type: none"> <li>planning, preparation, scheduling</li> <li>research, investigation, designing, testing</li> <li>networking relationship building</li> <li>thinking, creating, modelling, designing</li> <li>systems and process development</li> <li>anticipation and prevention</li> <li>developing change, direction, strategy</li> </ul> <p>Critical to success: planning, strategic thinking, deciding direction and aims, etc. Plan time-slots and personal space for these tasks.</p> |



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# 11 The To-do-List

Let's face it, not all of your daily tasks will fall neatly into fixed and regular boxes and we saw in the previous chapter how to prioritise in terms of importance and urgency.

The to do list tactic is invaluable in organising when to do those many numerous small tasks you will have. These are the ones that those who find planning challenging will fill their day up with, whilst avoiding or procrastinating over the larger or less enjoyable tasks.

I describe it like packing a suitcase – you start with the big things and then pack the little things (or in this case tasks) around them.



You can rank these smaller to do list tasks using a high, medium, low coding and you will find you can quickly become very proficient at doing this and then feeding this information into your daily plan.

## 11.1 The to-do-list template

| Tasks | Priorities | Ranking/Code | Time |
|-------|------------|--------------|------|
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |

This is an example of a chart I use with my students and delegates

Your to-do-list tasks go in the left hand side. The next column you can use to keep you focused on your current priorities and how any to do list items may help or hinder this. A high, medium or low ranking helps you focus and the final column gives your tasks a time frame. The main thing to remember with this column, as with all daily planning activities, is to be honest about the actual time something will take rather than how much time you would like it to take!

If you have trouble ranking the items as you feel they are all important and urgent ask yourself one question.

“If I could only do one of these things which would it be?”

This will help you decide on the highest ranking.

## 12 Prime & down time

Once you have identified and ranked your fixed and non-fixed tasks there is one further step you need to take to make this process even more efficient and this will really have you flying through the day. Although I do remember one student saying that if they became efficient all it would mean was they would be given more to do which they didn't want...but anyway, we're probably best leaving that comment to one side I think!

Let's have a look at what I mean by so called prime time and down time.

We all have different times of the day when we are at our peak. Some people are at their best early in the morning, others need a couple of cups of coffee before they get going and some find they are the most productive later in the day.

One of the best ways of thinking about time is that it is not all equal. In other words your prime time could be classed as having a greater 'value' in terms of being able to complete more complex, less enjoyable tasks.



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## 12.1 Your prime & down times

| prime time   | down time                      |
|--|--------------------------------|
| complex, larger, procrastination or less enjoyable tasks | routine, or less complex tasks |

40

# 13 The daily planning template

In this chapter I want to show you what a sample daily plan looks like and we'll go thorough each section in turn bringing together everything we have covered so far.

Ok, here goes...

You now know that effective time management requires a thorough understanding of:

- time pirates
- interruptions
- email
- fixed tasks
- non-fixed importance vs urgency
- to-do-lists
- prime and down times

## 13.1 Blank planning template

The daily planning template I am going to use is this one below. I know it works and it will do for you too, if you approach it in a structured way. Before too long it will become easier and more 'automatic' to fill in.

| Daily sheet                           |  | Date: _____        |
|---------------------------------------|--|--------------------|
| <b>priorities</b><br><br><br><br><br> |  | <b>email</b>       |
|                                       |  | <b>phone calls</b> |
|                                       |  | <b>meeting</b>     |
| <b>Fixed tasks</b>                    |  |                    |
| <b>To do list</b>                     |  | <b>notes</b>       |
| <b>Goals:</b>                         |  |                    |

So, lets take each part of this planning template in turn.

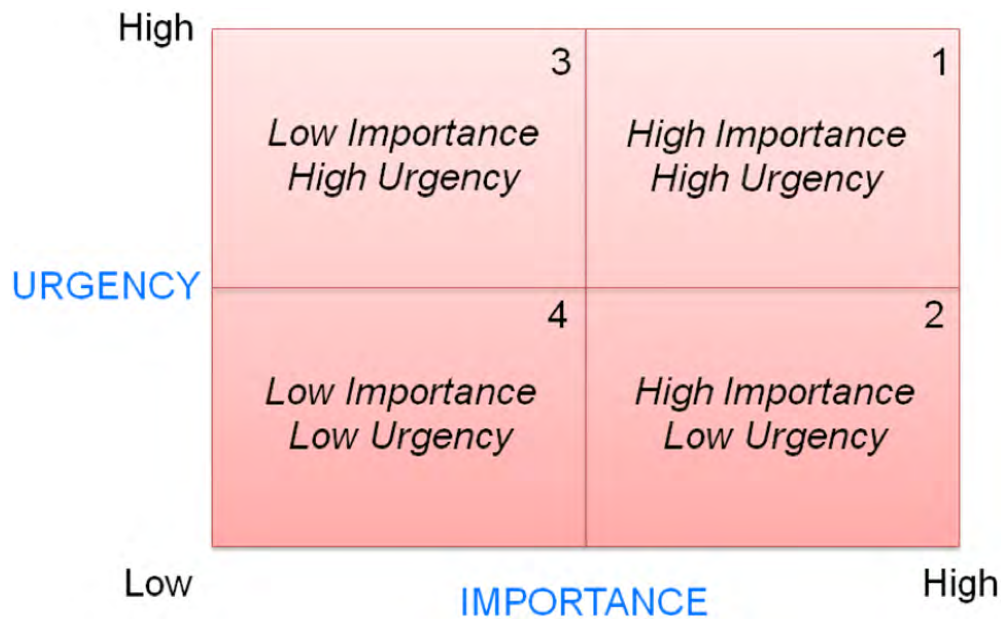
### 13.1.1 Fixed tasks

Your fixed tasks are already 'spoken for' in terms in when they must be completed.

Remember these are tasks which can not be moved. They are not tasks which you like to do, or have always done at a certain time.

|                    |  |                    |
|--------------------|--|--------------------|
| <b>Daily sheet</b> |  | <b>Date:</b> _____ |
| <b>priorities</b>  |  | <b>email</b>       |
|                    |  |                    |
|                    |  | <b>phone calls</b> |
| <b>Fixed tasks</b> |  | <b>meeting</b>     |
| <b>To do list</b>  |  | <b>notes</b>       |
| <b>Goals:</b>      |  |                    |

13.1.2 Non-fixed tasks



We saw earlier that the way to prioritise these tasks was by using the importance – urgency grid

- A task's **urgency** is determined by when it should be done
- A task's **importance** is determined by its contribution to the achievement of key results and longer term goals

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We also saw how important it is to limit time spent in box 1, as this is the Emergency Zone where you are not in full control and are subject to high levels of stress.

What we want is to increase the time spent on important but not urgent tasks (box 2), by planning and prioritising tasks ahead of time.

I have given you 6 'priorities' boxes but of course how many you have on your plan is entirely up to you, but remember the influence of your prime and down time.

So, your plan will now look like this...

|   |  |   |  |   |         |  |   |     |  |      |  |  |
|---|--|---|--|---|---------|--|---|-----|--|------|--|--|
| <b>Daily sheet</b>  |  | Date: _____   |  |   |         |  |   |     |  |      |  |  |
| <div style="text-align: center; background-color: #800000; color: white; padding: 5px; margin-bottom: 10px;"><b>priorities</b></div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%; text-align: right;">High</td> <td style="width: 45%; border: 1px solid black; padding: 5px; text-align: center;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p style="text-align: center;">3</p> <p style="text-align: center;">Low Importance<br/>High Urgency</p> </div> <div style="width: 48%;"> <p style="text-align: center;">1</p> <p style="text-align: center;">High Importance<br/>High Urgency</p> </div> </div> </td> <td style="width: 5%; text-align: left;">1</td> </tr> <tr> <td style="width: 5%; text-align: right;">URGENCY</td> <td style="width: 45%; border: 1px solid black; padding: 5px; text-align: center;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p style="text-align: center;">4</p> <p style="text-align: center;">Low Importance<br/>Low Urgency</p> </div> <div style="width: 48%;"> <p style="text-align: center;">2</p> <p style="text-align: center;">High Importance<br/>Low Urgency</p> </div> </div> </td> <td style="width: 5%; text-align: left;">2</td> </tr> <tr> <td style="width: 5%; text-align: right;">Low</td> <td style="width: 45%;"></td> <td style="width: 5%; text-align: left;">High</td> </tr> </table> <div style="text-align: center; margin-top: 10px;"> <p>IMPOTANCE</p> <p>(remember prime &amp; down time)</p> </div> |  | High  | <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p style="text-align: center;">3</p> <p style="text-align: center;">Low Importance<br/>High Urgency</p> </div> <div style="width: 48%;"> <p style="text-align: center;">1</p> <p style="text-align: center;">High Importance<br/>High Urgency</p> </div> </div> | 1 | URGENCY | <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p style="text-align: center;">4</p> <p style="text-align: center;">Low Importance<br/>Low Urgency</p> </div> <div style="width: 48%;"> <p style="text-align: center;">2</p> <p style="text-align: center;">High Importance<br/>Low Urgency</p> </div> </div> | 2 | Low |  | High | <div style="border: 1px solid black; height: 100px; margin-bottom: 10px;"></div> <p style="text-align: center; font-weight: bold;">email</p> |  |
| High  | <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p style="text-align: center;">3</p> <p style="text-align: center;">Low Importance<br/>High Urgency</p> </div> <div style="width: 48%;"> <p style="text-align: center;">1</p> <p style="text-align: center;">High Importance<br/>High Urgency</p> </div> </div> | 1   |  |   |         |  |   |     |  |      |  |  |
| URGENCY   | <div style="display: flex; justify-content: space-between;"> <div style="width: 48%;"> <p style="text-align: center;">4</p> <p style="text-align: center;">Low Importance<br/>Low Urgency</p> </div> <div style="width: 48%;"> <p style="text-align: center;">2</p> <p style="text-align: center;">High Importance<br/>Low Urgency</p> </div> </div>   | 2   |  |   |         |  |   |     |  |      |  |  |
| Low   |  | High  |  |   |         |  |   |     |  |      |  |  |
| <div style="border: 1px solid black; height: 100px;"></div> <p style="text-align: center; font-weight: bold;">Fixed tasks</p>   |  | <div style="border: 1px solid black; height: 100px;"></div> <p style="text-align: center; font-weight: bold;">phone calls</p> |  |   |         |  |   |     |  |      |  |  |
| <div style="border: 1px solid black; height: 100px;"></div> <p style="text-align: center; font-weight: bold;">To do list</p>  |  | <div style="border: 1px solid black; height: 100px;"></div> <p style="text-align: center; font-weight: bold;">meeting</p>     |  |   |         |  |   |     |  |      |  |  |
| <div style="border: 1px solid black; height: 100px;"></div> <p style="text-align: center; font-weight: bold;">Goals:</p>  |  | <div style="border: 1px solid black; height: 100px;"></div> <p style="text-align: center; font-weight: bold;">notes</p>       |  |   |         |  |   |     |  |      |  |  |

### 13.1.3 The to-do-list

Let's add in our to-do-list next and this was the template we used in chapter 11

| Tasks | Priorities | Ranking/Code | Time |
|-------|------------|--------------|------|
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |
|       |            |              |      |



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The rule we had here to stop us adding everything to this list and ranking it all the same was to ask yourselves...

**“If I could only do one of these things which would it be?”**

So, lets add this into our plan and see where we are...

| <b>Daily sheet</b>   |                                | Date: _____   |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
|--|--------------------------------|---|------|-------|------------|--------------------------------|---------------------------------|---------|---|---|--|-------------------------------|--------------------------------|-----|------------|------|--|--|--|
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| High   | 3                              | 1   |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
|  | Low Importance<br>High Urgency | High Importance<br>High Urgency   |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
| URGENCY  | 4                              | 2   |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
|  | Low Importance<br>Low Urgency  | High Importance<br>Low Urgency  |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
| Low  | IMPORTANCE                     | High  |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
| <div style="text-align: center; background-color: #800000; color: white; padding: 5px; margin-bottom: 10px;"><b>Fixed tasks</b></div> <div style="height: 100px;"></div>   |                                | <div style="text-align: center; background-color: #800000; color: white; padding: 5px; margin-bottom: 10px;"><b>To do list</b></div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th style="width: 30%;">Tasks</th> <th style="width: 15%;">Priorities</th> <th style="width: 15%;">Ranking / Code</th> <th style="width: 10%;">Time</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> |      | Tasks | Priorities | Ranking / Code                 | Time                            |         |   |   |  |                               |                                |     |            |      |  |  |  |
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|  |                                |   |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
|  |                                |   |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
|  |                                |   |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |
| <div style="background-color: #800000; color: white; padding: 5px; display: inline-block;"><b>Goals:</b></div> <div style="height: 40px;"></div>   |                                |   |      |       |            |                                |                                 |         |   |   |  |                               |                                |     |            |      |  |  |  |

#### 13.1.4 Email

We saw in chapter 9 the importance of not checking emails every couple in minutes. So, in your daily plan you should schedule time to ‘block check’ your mail and respond to those that will take longer than 2 minutes.

Remove ALL audio and visual cues that you have mail and set up ‘VIP’ addresses for emails that are always going to be urgent in nature.

Finally, set up automatic folders for emails you need to keep but don't have to respond to, for example the 'FYI' – for your information or newsletter.

| Daily sheet  |                                     | Date: _____                          |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
|--|-------------------------------------|--------------------------------------|-------------------------------------|--------------------------------------|---------|------------------------------------|-------------------------------------|-----|------|--|--|------------|--|--|--|--|--|----------------|
| <b>priorities</b><br><table border="1"> <tr> <td>High</td> <td>3<br/>Low Importance<br/>High Urgency</td> <td>1<br/>High Importance<br/>High Urgency</td> </tr> <tr> <td>URGENCY</td> <td>4<br/>Low Importance<br/>Low Urgency</td> <td>2<br/>High Importance<br/>Low Urgency</td> </tr> <tr> <td>Low</td> <td colspan="2">High</td> </tr> <tr> <td></td> <td colspan="2">IMPORTANCE</td> </tr> </table> <p>(remember prime &amp; down time)</p> |                                     | High                                 | 3<br>Low Importance<br>High Urgency | 1<br>High Importance<br>High Urgency | URGENCY | 4<br>Low Importance<br>Low Urgency | 2<br>High Importance<br>Low Urgency | Low | High |  |  | IMPORTANCE |  | <b>email</b><br>remove 'cues'<br>add vip's<br>set up folders |  |  |  |                |
| High   | 3<br>Low Importance<br>High Urgency | 1<br>High Importance<br>High Urgency |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
| URGENCY  | 4<br>Low Importance<br>Low Urgency  | 2<br>High Importance<br>Low Urgency  |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
| Low  | High                                |                                      |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
|  | IMPORTANCE                          |                                      |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
| <b>Fixed tasks</b>   |                                     | <b>phone calls</b>                   |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
| <b>meeting</b>   |                                     | <b>notes</b>                         |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
| <b>To do list</b> <table border="1"> <thead> <tr> <th>Tasks</th> <th>Priorities</th> <th>Ranking / Code</th> <th>Time</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>  |                                     | Tasks                                | Priorities                          | Ranking / Code                       | Time    |                                    |                                     |     |      |  |  |            |  |  |  |  |  | <b>meeting</b> |
| Tasks  | Priorities                          | Ranking / Code                       | Time                                |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
|  |                                     |                                      |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
|  |                                     |                                      |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
|  |                                     |                                      |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |
| <b>Goals:</b>  |                                     |                                      |                                     |                                      |         |                                    |                                     |     |      |  |  |            |  |  |  |  |  |                |



# What do you want to do?

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VOLVO FINANCIAL SERVICES | VOLVO 3P | VOLVO POWERTRAIN | VOLVO PARTS | VOLVO TECHNOLOGY | VOLVO LOGISTICS | BUSINESS AREA ASIA

### 13.1.5 Phone calls

When I work with teams rather than individuals this is an area where we can make a huge difference to someones day. If you are in a shared office consider having set periods where you answer all calls for given time slot. This frees up others to concentrate without multiple interruptions and allows you to focus just on phone calls. This period of time then passes to the next person(s). Clearly this strategy will be environment specific but I know this has been a huge success with previous students.

However, even if this tactic won't work for you you can still cluster phone calls together as this will be more productive than scattering them singularly throughout the day.

Also, know in advance, what you want to say and who you need to speak to. Try not to be left on hold and leave clear concise answerphone messages.

| Daily sheet   |   | Date: _____                                  |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
|---|---|--|--|------|---------|--|---|--|-----|------------|------|--|--|--|--|--|---|
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| High  | 3<br><i>Low Importance<br/>High Urgency</i>   | 1<br><i>High Importance<br/>High Urgency</i> |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
| URGENCY   | 4<br><i>Low Importance<br/>Low Urgency</i>  | 2<br><i>High Importance<br/>Low Urgency</i>  |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
| Low   | IMPORTANCE  | High   |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
| <div style="text-align: center; background-color: #800000; color: white; padding: 5px; margin-bottom: 10px;"><b>Fixed tasks</b></div> <div style="height: 100px;"></div>  | <div style="text-align: center; padding: 5px; margin-bottom: 10px;"><b>meeting</b></div> <div style="height: 100px;"></div> |  |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
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| Tasks   | Priorities  | Ranking / Code                               | Time   |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
|   |   |  |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
|   |   |  |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
|   |   |  |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |
| <div style="background-color: #D3D3D3; padding: 5px;"><b>Goals:</b></div> <div style="height: 40px;"></div>   |   |  |  |      |         |  |   |  |     |            |      |  |  |  |  |  |   |

### 13.1.6 Meetings

We saw earlier how inefficient and ineffective meetings can drain your time. But any meetings you are attending can obviously be added into your daily plan. You can also schedule in any prep time e.g. reading the agenda or associated documents. This ensures that you arrive for meetings prepared and less likely to 'waste' time.

| Daily sheet  |  | Date: _____   |   |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |
|--|--|---|---|---|-----|--|--|--|------|--|--|------------------------------|--|--|--|--|---|
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|  |  | <div style="display: flex; justify-content: space-between;"> <span>URGENCY</span> <span>IMPORTANCE</span> </div>  | High  |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |
|  |  | (remember prime & down time)  |   |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |
| <div style="text-align: center; background-color: #800000; color: white; padding: 5px; margin-bottom: 10px;"><b>Fixed tasks</b></div> <div style="height: 80px; border: 1px solid black;"></div>   | <div style="text-align: center; background-color: #800000; color: white; padding: 5px; margin-bottom: 10px;"><b>meeting</b></div> <p style="padding: 5px;">prep if needed<br/>arrive on time</p> |   |   |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |
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| Tasks  | Priorities   | Ranking / Code  | Time  |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |
|  |  |   |   |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |
|  |  |   |   |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |
|  |  |   |   |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |
| <div style="background-color: #800000; color: white; padding: 5px; display: inline-block;"><b>Goals:</b></div> <div style="border: 1px solid black; height: 40px; width: 100%; margin-top: 5px;"></div>  |  |   |   |   |     |  |  |  |      |  |  |                              |  |  |  |  |   |



### 13.1.7 Other elements

The other two parts of the daily planning template are for notes and goals. The notes section is clearly just that! But, I always find it useful to have a daily reminder of your goals – short, medium and long term. This keeps you focused and allows you to be much more strategic when prioritising, setting and completing tasks.

| <b>Daily sheet</b>  |  | Date: _____                                  |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
|---|--|--|--|---------|--|---|-----|------------|------|---|--|--|--|--|--|--|---|
| <div style="text-align: center; background-color: #800000; color: white; padding: 5px; margin-bottom: 10px;"><b>priorities</b></div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; text-align: right;">High</td> <td style="width: 40%; text-align: center; border: 1px solid black; padding: 5px;">3<br/><i>Low Importance<br/>High Urgency</i></td> <td style="width: 40%; text-align: center; border: 1px solid black; padding: 5px;">1<br/><i>High Importance<br/>High Urgency</i></td> </tr> <tr> <td style="text-align: right; color: #0070C0;">URGENCY</td> <td style="text-align: center; border: 1px solid black; padding: 5px;">4<br/><i>Low Importance<br/>Low Urgency</i></td> <td style="text-align: center; border: 1px solid black; padding: 5px;">2<br/><i>High Importance<br/>Low Urgency</i></td> </tr> <tr> <td style="text-align: right;">Low</td> <td style="text-align: center; color: #0070C0;">IMPORTANCE</td> <td style="text-align: right;">High</td> </tr> </table> <p style="text-align: center; margin-top: 10px;"><b>(remember prime &amp; down time)</b></p> | High   | 3<br><i>Low Importance<br/>High Urgency</i>  | 1<br><i>High Importance<br/>High Urgency</i> | URGENCY | 4<br><i>Low Importance<br/>Low Urgency</i> | 2<br><i>High Importance<br/>Low Urgency</i> | Low | IMPORTANCE | High | <div style="background-color: #800000; color: white; padding: 5px; margin-bottom: 10px; text-align: center;"><b>email</b></div> <p style="text-align: center;">remove 'cues'<br/>add vip's<br/>set up folders</p> <div style="background-color: #800000; color: white; padding: 5px; margin-bottom: 10px; text-align: center;"><b>phone calls</b></div> <p style="text-align: center;">group together<br/>avoid 'on hold'<br/>clear messages</p> <div style="background-color: #800000; color: white; padding: 5px; margin-bottom: 10px; text-align: center;"><b>meeting</b></div> <p style="text-align: center;">prep if needed<br/>arrive on time</p> <div style="background-color: #800000; color: white; padding: 5px; margin-bottom: 10px; text-align: center;"><b>notes</b></div> |  |  |  |  |  |  |   |
| High  | 3<br><i>Low Importance<br/>High Urgency</i>  | 1<br><i>High Importance<br/>High Urgency</i> |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
| URGENCY   | 4<br><i>Low Importance<br/>Low Urgency</i>   | 2<br><i>High Importance<br/>Low Urgency</i>  |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
| Low   | IMPORTANCE   | High   |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
| <div style="background-color: #800000; color: white; padding: 5px; margin-bottom: 10px; text-align: center;"><b>Fixed tasks</b></div>   | <div style="background-color: #800000; color: white; padding: 5px; margin-bottom: 10px; text-align: center;"><b>meeting</b></div> <p style="text-align: center;">prep if needed<br/>arrive on time</p> |  |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
| <div style="background-color: #800000; color: white; padding: 5px; margin-bottom: 10px; text-align: center;"><b>To do list</b></div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #D3D3D3;"> <th style="padding: 5px;">Tasks</th> <th style="padding: 5px;">Priorities</th> <th style="padding: 5px;">Ranking / Code</th> <th style="padding: 5px;">Time</th> </tr> </thead> <tbody> <tr><td style="height: 20px;"></td><td></td><td></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td><td></td><td></td></tr> <tr><td style="height: 20px;"></td><td></td><td></td><td></td></tr> </tbody> </table>   | Tasks  | Priorities                                   | Ranking / Code                               | Time    |  |   |     |            |      |   |  |  |  |  |  |  | <div style="background-color: #800000; color: white; padding: 5px; margin-bottom: 10px; text-align: center;"><b>notes</b></div> |
| Tasks   | Priorities   | Ranking / Code                               | Time   |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
|   |  |  |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
|   |  |  |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
|   |  |  |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |
| <div style="background-color: #800000; color: white; padding: 5px; display: inline-block;"><b>Goals:</b></div> <div style="margin-left: 10px;">keeps you focused when; prioritising, setting and completing tasks</div>   |  |  |  |         |  |   |     |            |      |   |  |  |  |  |  |  |   |

So, this is what a daily plan looks like and how each of the elements in this book so far 'feeds' into each section.



# 14 Saying “no”

Although saying “no” is not strictly a part of daily planning I wanted to add this because many of my students find it incredibly difficult.

Why might we say “no”?

- You will often say “yes” to others because we want to please them. But, when eventually you can’t continue, you may feel that you have let them down and therefore guilty. The result is that both parties suffer. So, firstly it is important to recognise that a desire to please often prevents us from saying no.
- Stick to your plan. If you have a written set of goals and strategies, you have a reason and visually reminder to stick to your course. Remember we put a list of your goals on the daily planning template sheet above.
- If someone persists, repeat your position, perhaps in a slightly different way.
- Make sure you understand exactly what is being asked of you before you respond. Perhaps the task is more time consuming than you thought. On the other hand, it may not take much effort at all and may be a great way to expand your contacts or skills.



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- Remember you have a right to say no. If you don't others may take you for granted and even lose respect for you.
- Be polite, but firm in saying no. You only build false hopes and create confusion if you give a wishy-washy to ambiguous response.

## 14.1 Saying "no" to a superior

Ok, I can hear you thinking, what happens if the person asking is a superior and I completely understand that that may create a more complex dilemma. So, here are my top tips...

When a superior asks you to do a new urgent task:

- Remind them that you are working on other projects that have already been identified as top priorities
- Ask for guidance in deciding where the new task should fall on the list of priorities – it's ranking
- Point out that you might be able to do everything, but not to the usual high standards that are expected. In other words you may dilute, or water down your high standards

These three tips will help you greatly in saying "no" and ensuring that those people asking you can see the effect of their request. It also maintains workplace relationships.

## 14.2 The UNER Approach

|          |            | description  | example   |
|----------|------------|--|---|
| <b>U</b> | Understand | appreciate the position the person asking is in    | <i>"I can see the position you are in"</i>  |
| <b>N</b> | "No"       | say "No" (assertive, not aggressive or submissive) | <i>"I am unable to help you, at this time"</i>  |
| <b>E</b> | Explain    | Explain the reason                                 | <i>"I have 2 tasks which are due for completion by Thursday and other parts of the project are dependent on these being done on time"</i>   |
| <b>R</b> | Recommend  | Recommend an alternative                           | <i>"I know X person in Dept Y has experience of this and may be able to help" or, "I can't help you with the whole task but I can give you 30 minutes to go through how I would tackle this and give you some resources that will help"</i> |

In any situation a simple process to follow when saying "no" is that of UNER.

The whole idea behind saying “no” in a productive assertive manner is to preserve relationships and maintain your effectiveness.

Inevitably though, we will all have to say “yes” and again there are productive ways of doing this.

### 14.3 Saying “yes”

Sometimes, saying “no” is unavoidable, so here are some techniques you can use:

- Tell the person you can agree to their request this time, but ask how the two of you might plan better, or more effectively and efficiently next time.
- Tell them yes, but see if there is something they can do for you. One good turn deserves another right?
- Tell them yes, but take control by saying you’ll come back to them with a timetable. For instance, *“I expect I’ll be able to do that for you by the end of the week.”*
- Put a condition on your agreement. *“If it would only take an hour, I’d be able to help, but I can’t give you more than that.”*

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# 15 A 10-Step action plan

Having a robust action plan for success will ensure there is no excuse for you not to start investing in yourself and putting into place the necessary steps to effective daily planning.

**Step 1** – complete a two week daily planning dairy – I put a sample diary in chapter 3. This will show you where your time actually goes and not where you think it does. A retrospective diary will not give you the information you need.

**Step 2** – commit to trying a daily plan for a period of a least a month. Changing the way you do things is not an easy task and I do not underestimate the challenges it will throw up for both you and potentially your colleagues. But, you need to give it time to become more comfortable and spontaneous.

**Step 3** – identify your time pirates. What tasks do you, not enjoy or you don't think are important?

**Step 4** – identify why you put tasks off or procrastinate – remember our frog and his friend the elephant. Do these 'frog' tasks first (preferably in your prime time) and break large, 'elephant' tasks down into smaller ones.

**Step 5** – develop a plan for dealing with interruptions – be it the telephone or face-to-face visitors. I am continuously amazed by students who tell me that by getting into the habit of standing up when visitors call has saved them huge amounts of time!

**Step 6** – change the way you deal with email. Consider automatic folders, vip addresses, removing 'cues' (for example an audible sound) and scheduling in email time. Again this is a tactic which people say is a fantastic time saver and I know it works.

**Step 7** – establish your fixed tasks that can not be moved.

**Step 8** – rank other tasks on the important – urgency matrix.

**Step 9** – place smaller tasks on a to-to-list. Remember the suitcase analogy – these can be fitted in around the larger tasks and should themselves be ranked.

**Step 10** – be mindful of when your prime and down times are – routine tasks are best completed in your down time and more complex or procrastination ones in your prime time.

## 16 A visual reminder

This is a visual metaphor which explains daily planning perfectly. This jar represents your day and into is going to go all the tasks you need to complete.

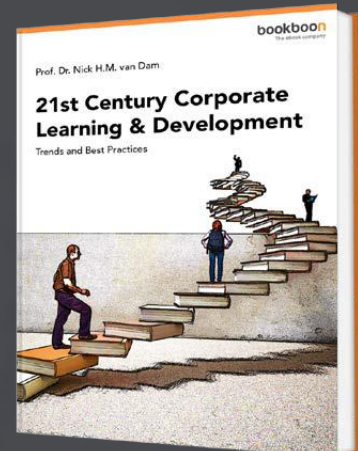


Using this I'll be able to show you how by doing things in a different order you can fit everything in without carrying anything over to the following day or taking work home.

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## 16.1 What people normally do

What people normally do is complete tasks in the same order they have always done, or, they complete the more enjoyable tasks first and put off the ones they don't like.



So, first we'll add the small enjoyable tasks...

Then the next ones...





Next we'll add some larger slightly more difficult tasks...



And finally we'll try to tackle the bigger pirate or procrastination tasks...



As you can see all your tasks don't fit into your day which means you either carry them over or take them home. This leads to negative feelings, resentment and in some cases stress.



## 16.2 What we should do!

Ok, now let's look at how we can use everything we have learnt in this case. Remember these 'ingredients' are the same as in the 5 images above.



Let's start with our 'blank' day again...

Next we'll reverse our normal way of doing things and tackle those large difficult or unenjoyable tasks first in our prime time...

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Your fixed time tasks follow...



And your to do list is next...

Interspersed with email...



Telephone time and meetings...



As you can see, by doing the same things but in a different order all tasks can fit into one day...



This approach reduces negative feelings and gives you time for personal development. As I said earlier, fundamentally changing the way you do things is not at all easy. But, bear in mind I have taught this for many years and those people that have stuck with it have reaped huge benefits.

# 17 Critical reflective learning – Part 2

In chapter 2 of this course we looked at **critical reflective learning questions part 1**, which examined your current practice and your attitude toward daily planning.

As a reminder these were the questions you considered...

1. Do you currently have a daily planning strategy?
2. If you do is it robust enough to enable you to complete tasks within your desired time frame?
3. Do you have concerns that introducing daily planning will make your day too rigid?
4. Have you ever undertaken a 2 week dairy challenge?
5. What are you wanting to get out of this book?
6. Do you believe it is possible to undertake the same days tasks but in a more effective manner?
7. What has prompted you to read this book?

Now, lets complete this process by undertaking **critical reflective learning questions part 2**, which will show you how far you have come over the course of this book.

Please answer these questions below...

1. Are there things in your current practice you now feel you need to / could change?
2. If so what are these?
3. Do you still have any concerns about this process being too rigid or taking up too much time?
4. Do you now feel more able to produce a considered structured daily plan?
5. What concerns, if any, do you have with this process

# 18 Summary

I really hope you have enjoyed this book. I appreciate that fundamentally changing the way you do things is not easy but you need to keep going until the process becomes automatic.

Bear in mind, I have seen time and time again that these tactics do work and I would urge you do remember the jar visual analogy. If you do the same tasks but in a different order everything can and does fit into one day. This is especially true when you combine it with having better processes for dealing with interruptions, saying “no” and “yes” and managing emails.

As a reminder for you I have included a document below that when printed you can laminate into a reminder card which many of my students have found helpful when placed on their desk or work space. On side 1 it has the fundamentals of what we have covered and on side 2 the importance vs urgency grid. I’ve even put a visual reminder of an elephant (for breaking large, daunting tasks down into smaller pieces) and a frog (to remind you not to leave the unpleasant task until the last minute as having it ‘hang over you’ will negatively effect your efficiency and effectiveness.



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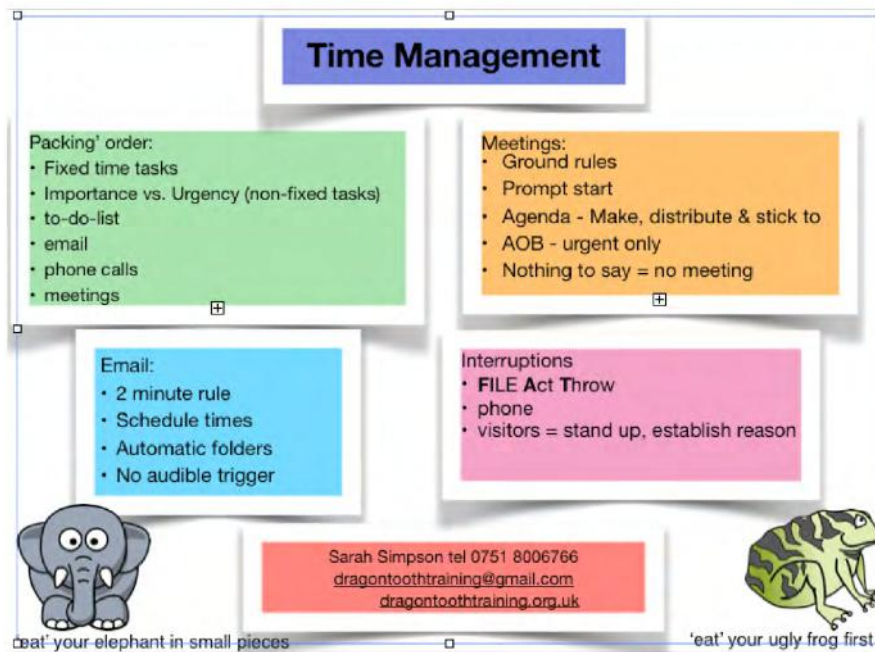
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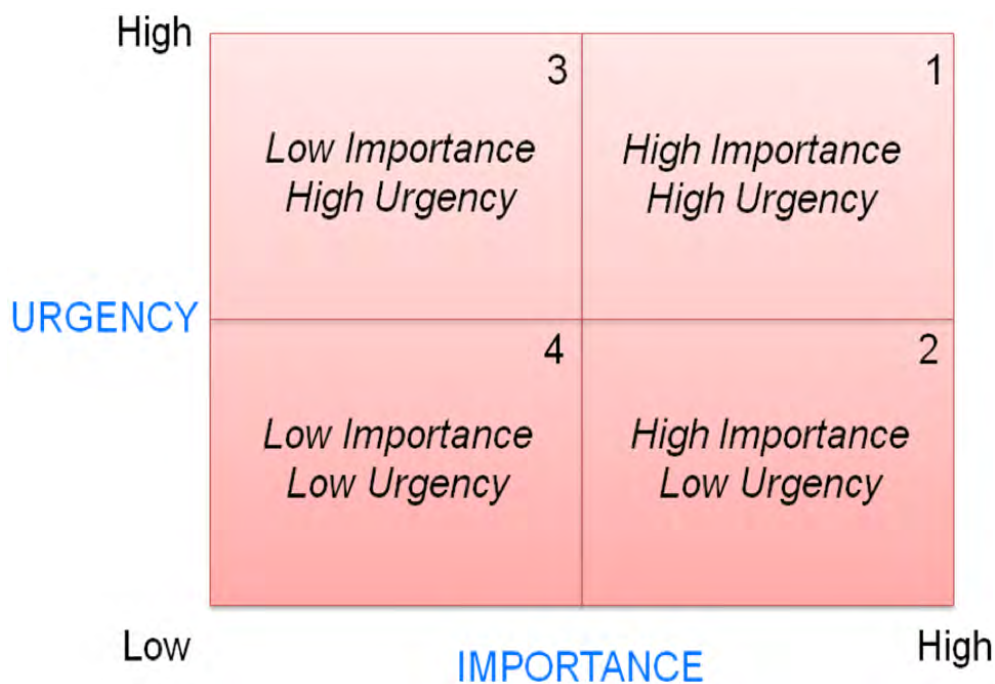


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## Side 1



## Side 2

Best wishes

Sarah

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