

BASIC ELEMENTS OF PLANNING

VISION (SHARED)

MISSION(S)

(SMART) GOALS:

SPECIFIC
MEASURABLE
ACHIEVABLE
RELEVANT
TIMELY

MONITORING

MEASURING

ANALYSIS

REPLANNING

Time Management Inventory

Instructions: Check the answer to each question that most closely describes your behavior (not your intentions) for each of the items listed below.

1. Can I readily recall all of my key work goals for the current and/or upcoming year?
 Sure! Some One What goals?
2. Can I list three or more personal goals I've been consistently working toward?
 Absolutely! Two or more maybe One Personal goals?
3. Do I consistently use a specific, portable daily planner?
 Always! Usually Sometimes What is planner?
4. Do I write a to-do list at the beginning of each workday?
 1st thing! Usually Seldom Do what???
5. Do I write a to-do list at the beginning of non-work days?
 Definitely! Usually Seldom You're kidding!
6. Do I prioritize the items on my to-do list?
 Sure! Usually Sometimes What to do list?
7. Do I complete my listed activities according to their priorities?
 Always Mostly Sometimes Priorities?
8. How effective am I at cutting off non-work interruptions?
 Super! Okay Fair Crummy
9. How effective am I at cutting off work-related low priority interruptions?
 Fabulous! Okay Fair Crummy
10. Do I feel 'burned out' on my job?
 Never Almost there Yes Definitely Beyond Burnout!

Implementing Practical Planning

11. What would a neutral observer say about my office/work area?
 Organized Uncluttered Casual Disaster
12. Do I have and use a filing system?
 Yes, always Yes, mostly Sporadically What's filing?
13. How often do I 'lose' things in my office/work area?
 Never Occasionally Daily I almost lost this inventory!
14. My boss delegates tasks to me that are:
 Interesting Confusing Routine & Boring Impossible
15. How good is my boss at giving clear, comprehensive delegation instructions?
 Great Okay Could improve I'll take the 5th!
16. Do I find myself doing urgent but fairly unimportant tasks?
 Never Occasionally Too often It's my life!
17. In meetings or conversations, do I ever find my 'mind 'wandering' instead of listening to what's being said?
 Never Sometimes Too often What?
18. How many pounds of paper are in my work area that I haven't looked through in the past 6 weeks?
 None A couple A dozen Get the truck!
19. Do I procrastinate?
 Never Occasionally Too often I almost didn't fill this out!
20. Am I punctual?
 Always Usually Sometimes Never – except by accident!
21. Is my productivity diminished by incoming, relatively unimportant phone calls?
 Never Sometimes Too often Yes, severely
22. Do I spend 2 or more hours per week in poorly planned/low priority meetings?
 No Occasionally Regularly More!!

Implementing Practical Planning

23. Do I have trouble ending phone conversations?

- Never Occasionally Many times Yes – all the time!!

24. Do I ever end a day in my present job with the feeling that nobody cares or notices my efforts?

- Never Occasionally Too often Frequently – including me.

25. Do I spend a great deal of time sifting through unnecessary e-mails?

- Never Occasionally Too often Regularly

26. Would people who know me call me a perfectionist?

- No Not many Three or four maybe Lots of people

27. Do I "run out of gas" after lunch or at some other regular time of the day?

- No Once a week Three times a week Yes – every day!

28. How strong is my tendency to think about what I'm going to say next while in a conversation with someone else?

- I don't Occasionally Frequently Habitually

29. Do projects or complex tasks I'm involved in ever stop because of an unanticipated need?

- Never Seldom Occasionally Too often

30. How good am I at changing habits?

- Great Good Fair Terrible

31. Other areas which cause me difficulties with time are:

Questions From Analysis of Time Log Activities

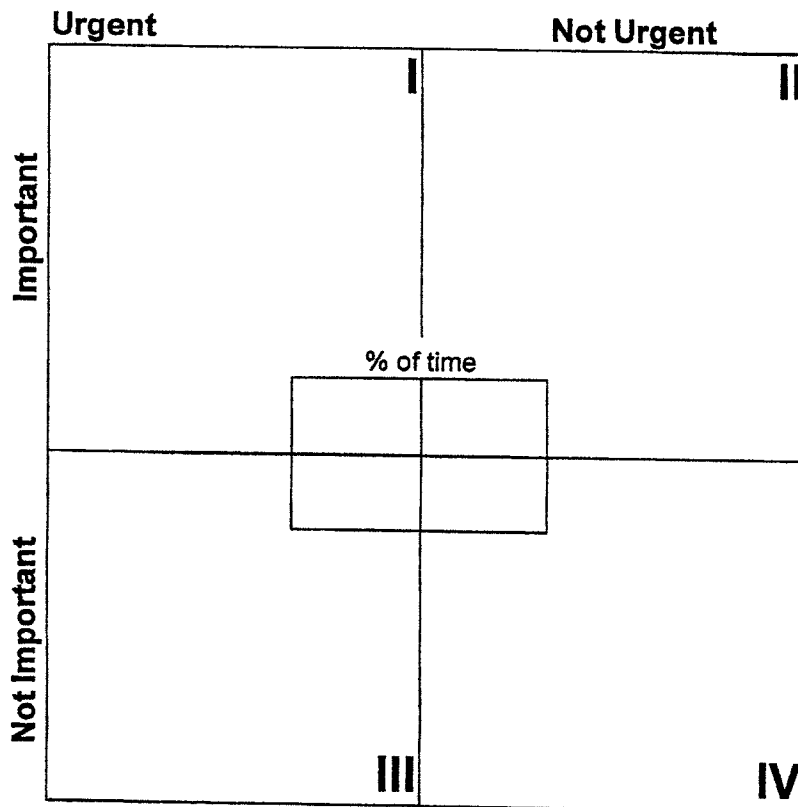
1. Did setting daily goals and times for completion improve your effectiveness? If so, why? If not, why not?
2. What was the longest period of time without any interruptions?
3. Which interruptions were most time consuming?
4. What can be done to eliminate or control them?
 - a. Which phone calls were unnecessary?
 - b. Which phone calls could have been shorter or more effective?
 - c. Which visits were unnecessary?
 - d. Which visits could have been shorter or more effective?
5. How much time was spent in meetings?
6. Did you tend to record activities or results?
7. How many of your daily goals contributed directly to your longer-range goals and objectives?
8. Can you now identify:
 - a. Those duties that only you can do?
 - b. Responsibilities that you can delegate?
 - c. Responsibilities that you can delegate entirely?
 - d. Activities that might be eliminated as unnecessary?
 - e. Activities that might be handled by someone else?

The Time Management Matrix

	Urgent	Not Urgent
<u>Important</u>	<p>I</p> <p>ACTIVITIES:</p> <p>Crises Pressing problems Deadline-driven projects</p>	<p>II</p> <p>ACTIVITIES:</p> <p>Prevention, PC activities Relationship building Recognizing new opportunities Planning, recreation</p>
<u>Unimportant</u>	<p>III</p> <p>ACTIVITIES:</p> <p>Interruptions, some calls Some mail, some reports Some meetings Proximate, pressing matters Popular activities</p>	<p>IV</p> <p>ACTIVITIES:</p> <p>Trivia, busy work Some mail Some phone calls Time wasters Pleasant activities</p>

Where Do You Spend Your Time?

Fit each of your past week in the quadrant which best describes its urgency and importance. Estimate the percentage of time you spent in each quadrant.



The important task rarely must be done today, or even this week. The urgent task calls for instant action. The momentary appeal of these tasks seems irresistible and important, and they devour our energy. But in the light of time's perspective, their deceptive prominence fades; with a sense of loss we recall the vital task we pushed aside. We realize we've become slaves to the tyranny of the urgent.

—Charles Hummell

Effective Time Management Techniques

	Urgent	Not Urgent
Important	I 20-25% 25-30%	II 65-80% 15%
Not Important	III 15% 50-60%	IV Less than 1% 2-3%

Bold type represents high-performance organizations

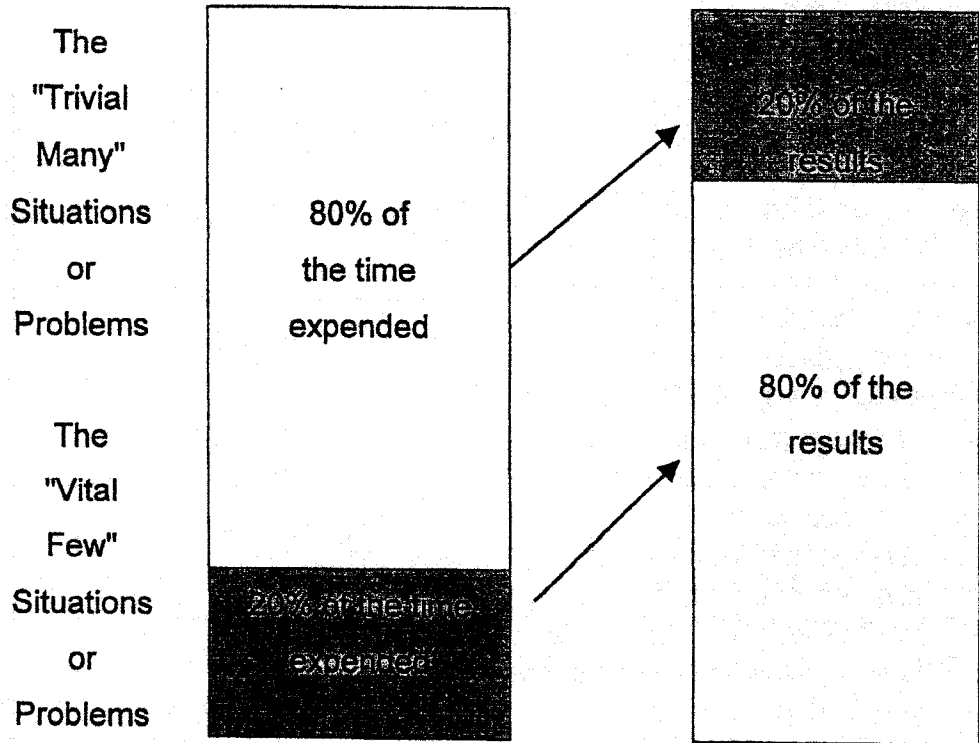
Normal type represents typical organizations

Covey Leadership Center, Inc.

Daily To Do List w/ Priorities

Goals of the Day		Accomplished?	
		Yes	No
1.			
2.			
3.			
4.			
5.			
6.			
(A-B-C)	Tasks		
	1.		
	2.		
	3.		
	4.		
	5.		
	6.		
	7.		

The Pareto Time Principle



Work with a Priority Mindset

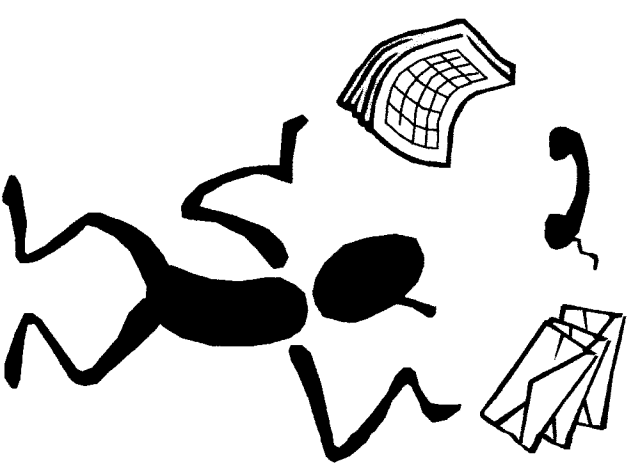
- Create a “To Do” List - Master List
- Plan your month, week, & day
- Assign priorities

A = Important & Urgent -

B = Important, Not Urgent -

C = Not Important -

D = Delegate



Planning Strategies

1. Set goals/objectives that you want to achieve a year from today
2. Reverse Plan each step/action within that 12 month time frame as you plan for it to take place so it happens in the 30,60,90,120,150, 180,210,240,270,300, 330-360 time period.
3. Repeat the process and plan for all other goals/objectives that need to happen within that same year.
4. From this planning blueprint you have developed create a 30, 60, 90, 120 etc. Determine if there are overlaps that must be implemented simultaneously or If something has to be pushed into the next time periods then adjust accordingly
5. Communicate with everyone in the company and concentrate on achieving the 30 day plan until it is complete and then the 60 day plan becomes your next rolling 30 day plan. The premise is that if you haven't completed the 30 day plan then you need to review your entire yearly plan so determine if it is still feasible or can be adjusted so that you are still able to achieve your yearly goals/objectives.
6. Although this is in reality short term planning tied to a yearly plan it forces concentration and implementation in 30 day increments which are doable and keeps everyone's focus on the developed planning activities

We need to learn from the Farmers plan for crop development. You plant in January for harvest in March if you have watered and fertilized appropriately. Next you plan in February the crop you expect in April etc., Mother Nature always surprises and forces adaptations to the plan and the Farmer reacts and adjusts accordingly to pull off a banner crop year. Planning and implementation is a dynamic/continuing process and can never be left to chance.

The ultimate test for the well planned/successful organization is:

1. Everyone is on the same page
2. Going in the same direction
3. At the same pace
4. All with the same sense of urgency
5. Dedicated to keeping their customers happy with the organization