

GET ORGANIZED: TIME MANAGEMENT STRATEGIES THAT WORK

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WHAT IS IN THIS WORKBOOK?

Part 1: Self-Assessments

- Identify Your Time Management Hurdles
- Take Control of your Day

Part 2: Time Management Tips, Tricks and Tools

- The Art of Divide and Conquer
- Know Your Productivity Cycle
- Create a checklist
- Phone Calls and Voicemails
- Turn your Email into your *Electronic Assistant*
- Paper and What to Do About It
- Pick Your Organizational Tools

Part 3: Tools to Help You Track Your Time

- Time Tracker Log
- Practice Creating a Daily Plan

Self-Assessments

Assessment: Identify Your Time Management Hurdles

(Take this assessment before the session to identify your time management habits)

Who in your life is a good time manager? What do they do that makes you think that?

What is standing in your way to effective time management?

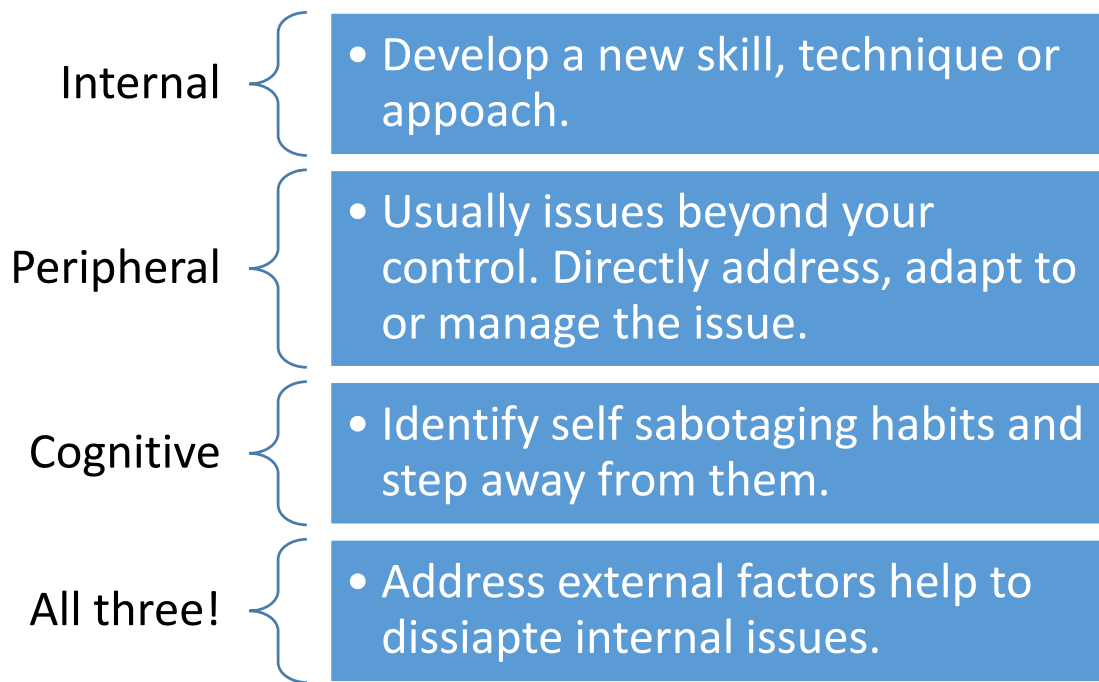
Time management experts have found the three categories that people fall into when they manage their time poorly (internal, peripheral, and cognitive).

Internal	External	Cognitive
• No time set aside to get things done • Miscalculated how long task takes • Task is complex • Forgot the tasks that need to be done • Disorganized • No time set aside to plan • Unrealistic workload	• Low energy (health/motivation) • In transition • Interruption prone environment • Discord from others around you	• Not clear on goals or priorities • Crisis addict • Anxiety/fear/dread • Caretaker • Perfectionist • Constantly at the disposal of others

Think about your day. Which “Hurdle Behaviors” do you engage in the most (*internal, peripheral, cognitive, or all three*)?

What are the consequences of these behaviors?

Think of a problem, situation or issue that keeps you from managing your time effectively. Use the tools below to begin to identify a course of action. Once you have identified what category you fall into, brainstorm next steps.



What did you identify? What steps do you want to take next?

Assessment: Take Control of Your Day

(Take this assessment before the session to evaluate how out of control is your workday)

	Usually	Always	Often	Sometimes
I am swamped with paperwork.	A	B	C	D
My desk is covered with piles of papers, files and books.	A	B	C	D
My computer files aren't backed up.	A	B	C	D
My computer files are disorganized.	A	B	C	D
I find it difficult to throw things away.	A	B	C	D
I'm often late, and I sometimes miss appointments.	A	B	C	D
I misplace small pieces of papers and sticky notes.	A	B	C	D
People put items on my chair or computer so I'll be sure to see them.	A	B	C	D
My inbox is always full.	A	B	C	D
I don't use my computer to get organized or to automate routine jobs.	A	B	C	D
I struggle with conflicting deadlines and demands on my time.	A	B	C	D
I feel discouraged or frustrated by my work environment.	A	B	C	D
I don't know what my real priorities are.	A	B	C	D
I start one task and then get distracted and move to another one.	A	B	C	D
People can't find items that I file or put away.	A	B	C	D
I dread starting a new project because I have so many loose ends to tie up with others.	A	B	C	D

What three things are you most concerned with?

Why do they concern you?

How have they impacted your productivity?

Time Management: Tips, Tricks and Tools

The Art of Divide and Conquer

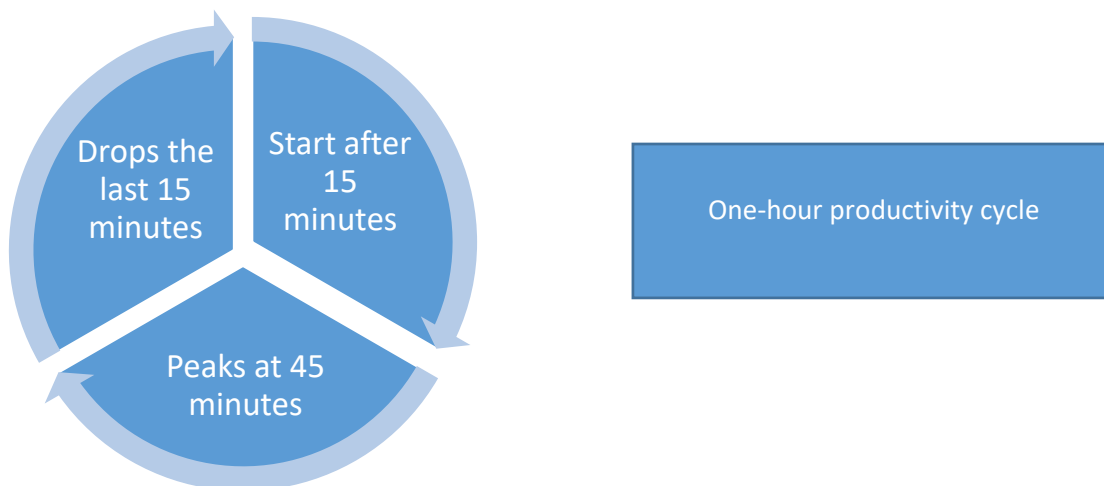
1. Break down the task by timed increments
 - “This morning, I will take 20 minutes to enter student data into excel.”
 - “This afternoon, I will spend 10 minutes answering emails from partners.”
2. Do the task you hate the thought of doing most
 - “I dislike updating student guides every summer, but I will block off my calendar for two days and get it done.”
3. Reward yourself for each increment of task completion
 - “I am going to draft two original RFP ideas, once I finish that I will do some online shopping.”
4. How to prioritize when you feel stuck?
 - Ask “What is important to me and what am I going to do first?”
 - Ask “If I can only accomplish one thing today, what would make me feel the most satisfied?”
 - Shorten work time on each task, when the time is up, move on.
 - When you are working, notice if you are focusing. If not, stop and take a break.
 - Be proactive about your time, propose and recommend solutions instead of asking for others to weigh in.
 - Get out of the weeds, schedule time for big picture goals.
 - Use the Quadrants (1-4) to determine what to do first.
 - Think of Quadrant 1 as firefighter mode. It is something that has to get done right away.
 - Quadrant 2 is important to you but can be done later.
 - Quadrant 3 is not important to you but is urgent for someone else or a project you are working on.
 - Quadrant 4 would be similar to filing or scanning paperwork. It’s something you can put off for when you have time.

1 Important/ Urgent	2 Important/ Not Urgent
3 Not Important/ Urgent	4 Not Important/ Not Urgent

Adapted from “*The 7 Habits of Highly Successful People*”
Stephen Covey

Know Your Productivity Cycle

Think of your productivity cycle in one hour chunks. It takes 15 minutes to get into a task and shut your mind off from distractions. Use your first 15 minutes to get organized and close down things that distract you. Turn off your email notifications, turn off the ringer on your phone and shut your office door or put on some noise cancelling headphones. The next 30 minutes is the ideal time to perform a task uninterrupted. Once you hit the 45-minute mark you come to the end of your productivity time. The last 15 minutes are when you take a break from the task. You can use this time to get a drink of water, go for a quick walk, check your email or chat with a co-worker.



Create a Checklist

Checklists are the best way to ensure you don't miss or overlook a step, address unexpected issues, and reduce errors and inefficiencies.

1. Write down everything you have to do in one location. You can't rely on your memory.
2. Determine if the project can be completed in one task or whether it needs multiple tasks. Build those tasks in.
3. Create a "Master List" for tasks that can be done in the future and a "Daily List" for tasks that need to be done by a specific date.

Master List	Daily List	Quadrant	Completion Date

Phone Calls and Voicemails

Depending on your job you may or may not receive a lot of phone calls. One thing to remember is just because you are getting a call, it doesn't mean to have to answer it. Some strategies you can employ are the following:

1. Screen your calls and return them during a specific time of day.
2. Have your calls go directly to voicemail when you need uninterrupted time to focus and concentrate.
3. Set up a voicemail to let people know when you are available or how you would like to be contacted.
4. Avoid returning calls during peak meeting times (9:00 to 11:00 AM; 1:00 to 3:00 PM).

Turn your Email into your *Electronic Assistant*

Writing and responding to emails can take over your entire day. You can customize your email to your particular needs.

How do you handle your email? Do you spend a lot of time organizing or responding to your email over getting work done? Do you feel like you need to respond to every email immediately? Is your email inbox overflowing? Do you open an email, read it, and then leave it in your inbox?

1. **Adopt a one touch rule**

Instead of leaving an email in your inbox, create folders that allow you to decide when you will respond. You can have one that says “Today” if it needs a response today. Label a folder to say “Weekly” if you can respond anytime during the week. Label a folder that says “Assign” if someone else is required to weigh in or make a decision and “Done” if you need an archival record.

2. **Set aside time to respond to email**

Set aside times during the day. You can try first thing in the morning, midday, or at the end of the day. If you receive a high volume of email you can check once an hour for a 10-minute period. When the ten minutes are up, stop responding.

3. **Use flags, features and categories**

Use your inbox as a to do list. Use **Flags, Categories, and To Do List** instead. Create folders for messages to certain people (e.g. Supervisor). Organize “To do” items (high, normal or low frequency; assign to someone else; create a reminder for yourself or track your progress as pending, in progress, deferred or complete).

- Set up meetings through email/calendar.
- Schedule reminders.
- Creating an electronic signature saves time by having your name, title and phone number accessible.
- Set reoccurring appointments.
- Track progress on your tasks.
- Share calendars with colleagues to make it easier to schedule meeting times.
- Create more than one calendar. Set up a personal calendar with reminders and make sure its synced with your work calendar.
- Use folders.
- Make to do lists to keep track of tasks.

- Create filters to view only items or files stored in folders that meet conditions you specify.
- Add rules which tell your program what to do with an email when it arrives.
- Use the preview email pane to make viewing your email messages easier.
- Use your out of office reply when you are away to give others a sense of your response time.
- Color code your calendar. This allows you to quickly scan your schedule.
- Keep copies of your sent email. You may need to refer back to an email you sent.
- Use Slack, Google Chat or Skype Chat in your office to keep email volume manageable.

4. Use the four D's to manage your email

DELETE	-> Does not require action. Can get the information elsewhere.
DO	-> Spend 2 to 5 minutes on an email.
DELEGATE	-> Assign to someone else who can complete the task.
DELAY	-> Add to your calendar or task for a later time.

Paper and What to Do About It

Paper can pile up fast. When it does, it's tough to get motivated enough to sort through it. How can you get on top of it? Carve out time to sort paper, 10 minutes a day, once week, once a month. Sort similar items put into three piles "To Do", "To File", and "To Trash." Scan and upload important documents electronically. Don't put it off, once you have contact with a document, take action on it.

Paper

1. Don't create files you *may* need, only files you *do* need.
2. Keep priority files accessible.
3. Store files of upcoming projects alphabetically, by urgency or chronologically.
4. Don't hold on to reference material, scan and purge!

Electronic

1. Organize your files in a format that makes it easier to locate.
2. Name folders and documents in a consistent manner.
3. Avoid saving multiple copies of the same document.
4. Create archives of old documents for deep storage, and get them out of your workspace.
5. Revisit your files to get rid of old documents that are no longer relevant.

Pick Your Organizational Tools

1. **Portable Day Planner or Calendar:** A paper tool is easy to use and accessible. However, you have to view it multiple times to identify your appointments. You have to have it with you at all times and there is no digital system to find information.

2. **Email Program:** You can use tasks, reminders, and rules. There may be too many reminders and you may not be able to access easily when you are out of the office.
3. **Smart Phone:** You can download apps, have access to your calendar and set reminders.
4. **Personal Organizational Programs/Apps**

There are many organizational tools available online, most of which are free. You may have to try a few different ones to see what works for you. They may not be compatible with software you use or you may not be allowed to load them onto your work computer. Here are a number of apps that are worth taking a look at.

- **Trello:** Plan your work on a virtual bulletin board. Rather than have lists of items to complete, this creates a board with sections to organize your ideas and gives you a list function to organize them. You can have a “to do,” “doing”, and “done” boards for projects. For writing projects, you can have “outline,” “writing,” “editing”, and “published” boards. This is a great tool for brainstorming ideas. You can group your ideas at every stage until completion. *Free for core features with unlimited boards. \$9.99 per month for unlimited power ups and management tools.*
- **Evernote:** Allows you to save anything as a note. You can use a built in camera to scan documents. This allows you to track business cards, receipts, tickets, forms, and more. You can organize everything using a drag and drop filing system. You can tag items to build a customized productivity system. You can use search tools that will recognize the text in your images and scans and pull it up. You can turn your written notes into digital notes. *It's free up to 60 MB per month, then \$7.99 a month for more storage.*
- **Awesome Note:** Will combine your to-do list, notes, and calendars. It's user friendly and customizable.
- **Timeful:** Time assistant. You plug in your must do and want to do item and the app finds time on your calendar to make the most efficient schedule possible.
- **Siri, Google Assistant, and Cortana:** Digital artificial assistants. Cortana can take notes, write lists, and set reminder which you can set daily, weekly, or as a tracker (e.g. buy flowers when you pass your favorite flower shop).
- **Asana:** Group project management tool. You can collaborate on a multi-function interface to coordinate tasks and conversations. You can keep track of your colleague's schedules in one place and assign due dates and propose new ideas.
- **Zapier Price:** Project management tool that connects your apps and automates your work. The app automations are some of the most powerful ways to boost your productivity; instead of copying and pasting data between apps, sending the same messages and setting up the same project each month. This tool can do that for you automatically. It can connect over 1300 apps and workflows that tie everything together. *Free for 100 tasks per month, then starting \$20.00 for different plans.*
- **Toggle:** Tracks your time. It keeps up with your tasks and tracks how long each task takes to complete. It can also remind you to take a break. *Free for core features.*
- **Full Contact Card Reader:** Scans business cards, reads them, and converts information into an iPhone contact.

- **Todoist:** Helps you organize your tasks and tracks your productivity. It helps you plan your work. It has a tool called Quick Add that recognizes dates, project names, and tags. You can list your tasks and check them off. The tracker then calculates how productive you have been today and this week and gives you data to show whether you are being productive or not. It gives you a score to keep you motivated. It gives you your tasks to be done today and for the next seven days. You can view all your tasks and sub tasks at once or open a single project to focus on the tasks and finish them at one time. *Free for 80 active projects. \$29/year for 200 projects or access 20 people per project.*
- **Rescue Time:** Tracks your productivity. It tracks all the websites you visit, the apps you use and logs how much time you spent each day. Fee for core tracing features. *\$9/month to block distracting sites and track time away from your computer.* (Also see **Pocket** below.)
- **Google Keep:** If you are the type of person who writes notes on Post Its and then loses them, this is the app for you. It makes digital copies of your Post It notes. You can use it to add tasks, lists or reminders. There is a sidebar in Google Docs that allows you to drag notes from Google Keep into your documents so you don't forget something important you wanted to add. *Free.*
- **Pocket:** If your favorites task bar is bloated with too many favorites then use this tool to save your favorite website links. You can organize them and tag them by category. You can add it to your browser. This way, you can save articles, videos, and websites to visit later before you forget about them. *Its free but \$4.99/month for no ads and for a permanent archive.*
- **Cloze:** Organizes your contacts. It's a smart address book that pulls your contact info together automatically from social networks, email, and other apps. It will figure out which of your contacts are connected when you search. If you can't remember the name it will help you track the contact by remembering a detail. It will remind you to reconnect if you have not reached out to business contacts in a while. A little nostalgia for those of you who remember when LinkedIn used to do maps of your contacts. *Free for core features. \$19.99/month for the pro plan.*
- **Zoom:** Video conferencing tool. You can video conference in up to 100 people at one time. You can record the call, use a chat box and screen sharing. You can also use a virtual sketch board to add your ideas during a call. *It's free for up to 100 participants for a 40-minute-long meeting and \$14.99 for unlimited meetings.*
- **Last Pass:** Manages your passwords. Passwords requirements are getting more complicated and it's hard to remember all of them. This password management app keeps your passwords private. You can also use this to remember credit card info, addresses and other data that you use to fill out forms. *The core features are free then \$2/month for premium to share passwords and store encrypted files.*

Tools to Help You Track Your Time

Time Tracker Log:

How do you spend your time? Use this log to help you track how you spend your day. Ask yourself the following:

1. What is the best time for you to complete tasks that require concentration?
2. What is the best time for you to complete routine tasks that do not require a great deal of concentration?
3. Track how long it takes for you to complete projects and/or tasks?
4. Where is your wasted time going? How can you redirect it?

Time of Day	Task	Estimated Time	Project
7:00 AM			
8:00 AM			
9:00 AM			
10:00 AM			
11:00 AM			
12 Noon			
1:00 PM			
2:00 PM			
3:00 PM			
4:00 PM			
5:00 PM			
6:00 PM			
7:00 PM			
8:00 PM			
9:00 PM			

Practice Creating a Daily Plan:

Once you have identified your tasks in tab 1, take stock of your most productive hours of the day.

Prioritize what is important and urgent and then create your daily plan. Remember Quadrant 1 and 2 take priority over 3 and 4.

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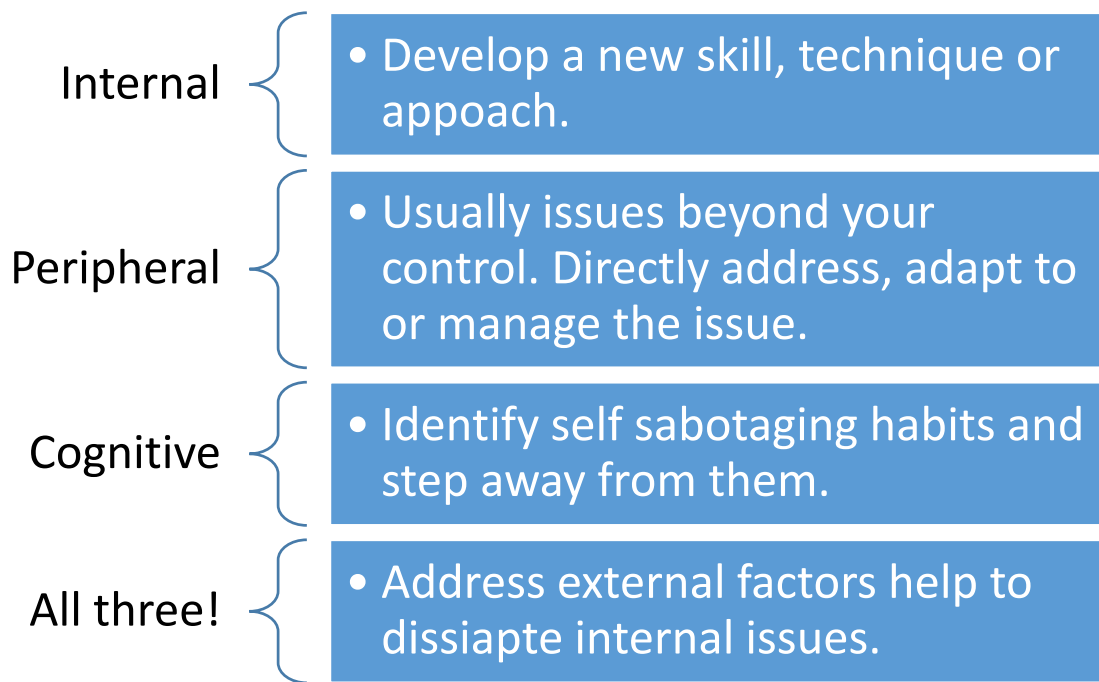
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What did you identify? What steps do you want to take next?

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