

TAKE CONTROL OF YOUR DAY

STREAMLINING YOUR DAY WITH SYSTEMS AND WORKFLOWS

NALP 2021

Fairuz Abdullah, Certified Coach and Director of Employer Relations, UC Hastings

Drew Amoroso, Founder, Due Course

Table of Contents

- A. What is Your Relationship to Time?
- B. Four Easy Steps to Time Management
- C. Four Steps to Manage Email
- D. Four Steps to Organize Your Desk
- E. Systems and Workflows

A. WHAT IS YOUR RELATIONSHIP TO TIME?

This exercise will help you understand some issues that will not only help you explore your relationship to time but also any roadblocks standing in your way when you make a change.

What does it mean to be productive for you? Where is this view coming from?

What was your family/cultural relationship to time growing up?

When you are critical of your time management, what comes up for you?

What does *good* time management mean to you? Where is this view coming from?

Think of a productive time in your life? What were the components?

What have you done in the past to contribute to good time management?

B. FOUR EASY STEPS TO TIME MANAGEMENT

CAPTURE • SIMPLIFY • SORT • PROCESS

1. CAPTURE

ROUND UP EVERYTHING ON YOUR MIND

Add work related or personal

Add items you would put on your “To Do List”

- Projects you want to start or finish
- Commitments
- People to respond to
- Items of procrastination

2. SIMPLIFY

YOU CAN TAKE CARE OF IT NOW

I can finish this in less than two minutes

IF YES – DO IT NOW!

Does someone else have to take action on this?

IF YES – SEND IT TO THEM

File for later

Scrap it!

3. SORT

YOU CAN TAKE CARE OF IT LATER

There is *no* clear NEXT ACTION then sort by:

POSSIBLE: May become projects or actions later, you're not sure yet.

WAITING: Someone else has to take an ACTION STEP before you can.

CALENDAR: Add deadlines for actions items to be completed later.

4. PROCESS

ASSIGN A TIME TO COMPLETE NEXT ACTIONS

Identify when you want to get things done

TODAY

THIS WEEK (5 to 7 days)

LATER (more than 7 days)

C. FOUR STEPS TO MANAGE EMAIL

1. DELETE

2. ANSWER – Delete or archive in “DONE” folder

3. DELEGATE – Forward to someone else

4. SORT by Folder

- **TODAY** – Answer by the end of the day
- **THIS WEEK** – need more info *or* others need to answer (Check 2x's per week Wed/Friday) to review.
- **PENDING** – need more info, others need to answer or don't have enough information
- **DONE** – Your archive folder

SORT by Rules

CREATE a RULE

Rules is an email tool you can use to automatically move your email into an action item that you have created. This could be a folder, flags, importance, movement in your inbox to name a few. This works best for emails that you get from similar groups of people. For example, you can set a rule to have all your emails from your boss or management team go into one folder as they come in.

Create a Rule in Office 365

- Go to **Settings**
- Click on **Rules**
- Click **Add New Rule**
- Name **Your Rule**
- Add a **Condition**
- Add an **Action**

D. FOUR STEPS TO ORGANIZE YOUR DESK

TASK • SORT • PURGE • PLACE

1. Break your clutter into **TASKS**
 - IMPORTANT
 - TANGENTIAL
 - PERSONAL
2. **SORT**
3. **PURGE** a.k.a. *Marie Kondo it!*
 - Are the items practical, informational or meaningful? If Yes - SORT THEM.
 - When was the last time you used it? More than a year? PURGE IT!
 - Is it a duplicate? PURGE IT!
 - Would someone else find this useful? SEND IT TO THEM.
4. **PLACE** – find a home for it. FILE, SCAN OR SHRED!

E. Systems and Workflows

Overview of Steps in the Routine Building Process

Step 1: Identify A Strong Why

The foundation of changing a part of your workday is your desire to experience some sort of positive change in circumstances - we're not going to be motivated to make a change unless we have a desired outcome in mind. The first part of building a routine is to identify the reason why you want to create this routine in the first place.

Step 2: Build the Routine

In Step 2 we actually build the routine - list out very specifically what the steps are to this process.

We also want to keep these routines simple in the beginning - just a few steps, 3 steps at the most, so that we make it easy for our brains to adjust to the new routine.

Step 3: Identify the Cue

The cue is the trigger for the routine - it could be a time of day, a location, an emotion, or an immediately preceding action, for example.

Step 4: Choose a Reward

Choose a reward that will elicit a positive emotion immediately after the routine. This is the most important part of the equation and we want to choose something that will give us that release that incentives repetition.

Summary: Building a Routine

Step 1:
Identify a Strong “Why”

Step 2:
Build the Routine

Step 3:
Identify the Cue

Step 4:
Choose a Reward

Overview of Steps in the Workflow Building Process

There are 3 key steps to building and implementing a successful workflow: 1) Identify a good candidate 2) Outline the workflow, and 3) train others how to use the workflow.

Step 1: Identify a Good Candidate.

A good candidate for a workflow is a piece of work product or a process that you create or engage in frequently that is familiar to you. Pick a project or a task or a process that you're familiar with and that you've completed at least a few times so that you have a good handle on its scope and component parts.

Step 2: Outline the Workflow

In this step what we're doing is taking the time to identify each specific, actionable step in the flow, including key pieces of information like the people, materials, and resources you need to complete the work. As a starting point, begin by outlining:

- any applicable timelines
- the actual action step itself
- the responsible person, if there's more than one person, and
- any resources, notes or materials that are involved in this particular step of the process.

In my experience when starting off, it's important to keep these steps simple. The more information-heavy you make this process the less likely you are to get it off the ground and actually use it.

Step 3: Train Others You Work With

The third and final step is to train others you work with to get everyone on the same page. This is a critical step that will ensure your workflow is put to good use.

Outline the Workflow

Applicable Timeline	Action	Responsible Person	Resources, Notes + Materials

New Project Workflow

Applicable Timeline	Action	Responsible Person	Resources, Notes + Materials
<i>Within one day of new project</i>	Create new project folder in shared team drive and share with team	<i>Assistant</i>	Remember to use proper file naming conventions
	Add new project to weekly team agenda	<i>Assistant</i>	
<i>Within 3 days of new project</i>	Fill out 1-page project overview and save in new project folder	<i>Person 1</i>	See project overview template
<i>Before team meeting</i>	Schedule 30-minute individual meeting with supervisor to review new project	<i>Person 1</i>	
	Save meeting notes in project folder	<i>Person 1</i>	