

# Fine-Tuned Time Management

Time-Management Seminar  
and Workbook

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## Introduction

A professional in today's corporate environment faces more ways than ever to be distracted, interrupted and kept from completing the tasks important to them.

Emails. Phone calls. Instant messages. Text messages. Webinars.

More information than ever to keep track of. More new technologies than ever to learn.

With all these distractions and commitments, are you able to keep up? Are you finding time to take on the big-picture projects that really matter to you?

We have just 1,440 minutes every day. Are you using them as wisely as you'd like?

This four-hour seminar and companion workbook will help you:

- *Get more done in less time*
- *Make progress toward your big-picture goals*
- *Become a productivity superstar*

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## See the Big Picture

This course and workbook are loaded with tips and strategies for getting more done in less time. But completing tasks for their own sake isn't your goal. Your goal is to use better time management to accomplish more of the things that matter to you.

**What are your “big picture” goals?** Some examples:

- Earn more money than I ever have
- Spend more time with my family
- Become the top salesperson in my group or company
- Enjoy my job and career
- Become a mentor or advisor to newer colleagues

Now, let's examine a typical salesperson's to-do list for a given day:

- *Respond to inquiry email forwarded from Customer Service*
- *Go to C&R, Inc. headquarters for product demo at 9:45am*
- *Department meeting at 12:30pm*
- *Weekly status report due to Jim by end of day*

Not much of this salesperson's day seems to be connected to “big picture” goals.

He might check off all the tasks on his to-do list, and he might feel productive. But it seems he's going through the day *reacting*. What about being *proactive*, even audacious? What about making progress toward a big-picture goal?

Also, because this salesperson has left much of the day open, it will probably get filled up with requests and emergencies—emails, calls, a last-minute meeting, etc.

As you learn the time-management techniques in this course, keep in mind that the primary reason to better manage your time is so you can reach your real goals.

Jot down a few big-picture goals, then list any tasks you can think of to get you there.

### **My Big-Picture Goals**

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### **Tasks to Get Me There**

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## Time-Management Basics

### Capture Everything

*Getting Things Done* author David Allen points out that one reason we feel stressed and overwhelmed with work is that we don't have all of our tasks written down. That means we waste precious brainpower keeping track of them in our heads.

You probably have dozens of work-related to-do items at any given time. If they're not all written down in a place you trust, your brain is constantly running through that list: "Finish the proposal for Prospect A, send that letter out to Client B, prepare my weekly status report for Friday's meeting, blah blah blah." Your brain never stops cycling through these tasks, because if it stops, you might forget one of them.

This is exhausting, stressful, and wastes vital energy that you need to be productive. The answer? Write everything down in a place that you check regularly.

Try it. See if you can think of 4 things on your mental to-do list that you haven't already written down somewhere. You should feel an immediate sense of relief.

To-Do: \_\_\_\_\_

To-Do: \_\_\_\_\_

To-Do: \_\_\_\_\_

To-Do: \_\_\_\_\_

Now you can use this little bit of newfound brainpower to be proactive and creative.

**Strategy:** Carry a notebook or keep notepads at your desk, home, car, etc.—so you can write down tasks or ideas when they occur to you. Check these lists regularly to make sure you're dealing with these to-dos. If possible, have a single tool (a journal, PDA, simple notepad, etc.) to capture as many of these items as you can in one place.

### Break Complex Projects into Tasks

Every item on your to-do list must be a "task," an actionable step toward a goal. If it isn't a task, you'll be more likely to put it off, because the next step won't be obvious.

Examine the following list and find the item that isn't actually a task—that is, it doesn't have a clear next action for you to take.

- *Call Julie Brier at ABC Company about her product question*
- *Complete and fax supply order to Facilities Management*
- *Hire assistant*
- *Schedule meeting for next week with prospect at XYZ Company*

**Answer:** “Hire assistant” is not a task. You can’t hire an assistant in a single step.

Imagine you saw that list on your desk. Chances are you’d deal with any of the other items first, like “complete and fax supply order,” because they’re simple tasks you can tackle.

How could you break “Hire assistant” into actionable tasks? Here are some ideas:

- *Call HR to determine salary range for assistant position*
- *Write job description*
- *Send job description to HR for posting to job boards*
- *Block two hours on calendar to review resumes and schedule interviews*

Now you can start making progress toward hiring an assistant!

**Strategy:** Always ask yourself as you put items on your to-do lists, “Is this a task with an actionable next step? If not, how can I break it into actionable tasks?”

## Make an Action Plan Every Day

It’s when we don’t have an action plan for our time that our time gets away from us.

Schedule the first part of each morning (even if it’s just 5 minutes when you get to your office or before you leave the house) to map out the day. What do you want to accomplish today? What will have to happen for you to call today a success?

**Idea:** frame this action plan as a promise to yourself

Sure, there are always surprises, fires and interruptions. But if you’ve already made a deal with yourself to accomplish A, B and C—remembering to include big-picture items that really matter to you—you’ll be able to deal with those interruptions appropriately and stay on track.

**Strategy:** Put “Create Action Plan for Day” on your calendar as a standing Meeting you have each morning—for 5 minutes, maybe 15, whatever time you need. If you see this item on your calendar each morning, you’re more likely to do it.

<i>October 14</i>	<i>7:30am – 7:40am</i>	<i>“Create Action Plan for Day”</i>
<i>October 15</i>	<i>7:30am – 7:40am</i>	<i>“Create Action Plan for Day”</i>

For your Create Action Plan meeting, grab a sheet of paper, write down all the things you know you have to get done for the day (the reactive stuff), and some more proactive items you want to get done. Keep this paper either on your desk or with you wherever go you throughout the day.

## Schedule Time to Work

This one might sound unnecessary—you're always working, right?

But, remember, if you don't claim control of your time, other things will rush in and steal that time.

It's important that as you create the day's action plan, you block aside specific time for heads-down, no-interruptions work.

Use this time to write that sales proposal, answer that email addressing the prospect's concerns, make some cold calls—and maybe to try something audacious. Otherwise, your day will get filled up with reactive tasks—interruptions, drop-ins from coworkers, phone calls, etc.

Your scheduled time to work might look something like this:

*8:30am – 9:00am      Compile list of clients to ask for reference letters*

*10:00am – 12:00pm   Draft sales proposal for XYZ Company*

*1:00pm – 1:30pm      Write new phone script offering 30-day guarantee*

Now, if you've actually scheduled these tasks during the day, you'll guard the time more forcefully and be less vulnerable to interruptions. Also, you've also put the day's tasks into blocks of time, creating a hard stop for each. So you're more likely to complete each task in the time you've allotted.

Treat this time like you would a meeting—get started on time, get your head down and get it done. Don't stop for phone calls, incoming emails or any other distraction.

## Know How Long Tasks Take You

You simply can't effectively manage your time—let alone become a proactive superstar—if you don't know how much time you need for your typical tasks.

What if you block aside 30 minutes to prepare for a prospect presentation, when in fact you really need 2 hours? Not only will you not get enough prep done to give your best presentation, you will also feel stressed right up until the presentation itself—which will negatively affect everything else you're working on.

If, on the other hand, you can confidently estimate how long a given action item will take you, you can slot that action into your day knowing you'll have time to get it done—as well as everything scheduled around it.

**Strategy:** Learn how long your typical tasks take you. Next time you start a task that you have to do regularly, clock yourself, and record how long it takes you. Use the sample worksheet below as a guide.

Task: \_\_\_\_\_ Estimate: \_\_\_\_\_ (Minutes / Hours)

Task: \_\_\_\_\_ Estimate: \_\_\_\_\_ (Minutes / Hours)

Task: \_\_\_\_\_ Estimate: \_\_\_\_\_ (Minutes / Hours)

Task: \_\_\_\_\_ Estimate: \_\_\_\_\_ (Minutes / Hours)

Task: \_\_\_\_\_ Estimate: \_\_\_\_\_ (Minutes / Hours)

**Tip:** Get a small, portable timer to help you track how long each task takes you.

## Don't Multitask

Multitasking is a myth.

Study after study has demonstrated that when you “multitask,” you’re actually just doing several tasks *badly* at the same time. Those same studies have found that it takes your brain several minutes to fully adjust from focusing on one task—say, writing an email—to another task—such as reviewing your notes for a presentation.

This means that if you instantly jump back and forth between different tasks, you’re actually not fully focused on any of them.

Instead, “single task”—and give every task the full benefit of your brainpower.

Imagine this scenario: You’re drafting a response to an inbound email lead, when the phone rings. You answer it—Steve in accounting has a question about your last expense report. You listen to Steve, but you’re still trying to write your email. Meanwhile, you missed part of what Steve said, and now you’re not sure which item on the expense report he’s asking about. Then, your computer dings—a new email. You click away from the message you’re writing to read the Subject Line: “Sales Meeting Rescheduled.” You open that email—but Steve just asked you something and you weren’t paying attention.

This is multitasking—and it’s always a mess!



You'll get more done if you devote your full attention to each task, until it's done.

In the scenario above, here are some ways you could've better handled the multiple tasks clamoring for your attention:

- *Continue writing your email until you're finished; don't take Steve's call.*
- *Take Steve's call, but stop working on—or even looking at—the email you're writing until the call is over. Then focus 100% of your attention on writing it.*
- *Take Steve's call, but tell him you're on a hard deadline and ask to call him back in a few minutes.*
- *Turn off the alarm sound on your computer that alerts you to every new email.*

## Organize Your Space

Have you noticed how much more productive and energized you feel when your workspace is totally clean and organized? Looking at a work area loaded with random piles of materials is stressful, and stress saps you of energy and brainpower.

Every time you glance at a stack of disorganized paperwork on your desk, some part of your brain is registering the fact there might be important work in that stack, work you're missing because you can't see it.

That's why you're far less likely to have a creative or inspirational idea if you're not organized.

But there's another reason to keep all of your work environments and tools organized—your desk, drawers, file cabinets, laptop bag, personal organizer, anywhere you spend time working or retrieving work-related materials. The more organized you are, the easier it'll be to find things as soon as you need them. Nothing slows your progress faster than not being able to find what you need.

This goes for electronic organization too. That means maintaining a clean and up-to-date contact list, electronic calendar, email inbox, etc.

Remember: It takes energy to stay disorganized. So get organized, and put that wasted energy into being productive, proactive and creative.

**Tip:** Don't know how to start getting yourself organized? There are some great resources to help you. Try Julie Morgenstern's book *Organizing from the Inside Out*, and the excellent productivity website [www.43folders.com](http://www.43folders.com).

## Group Tasks by Level of Importance

Now that you know how to break projects into actionable tasks, how to keep your eye on your big-picture goals and how to create action plans to control your day, let's pull all that knowledge together—and learn to group tasks by importance.

One way to do this is to group items on your to-do list into three categories:

1. Must Do Now
2. Must Do Soon
3. Would Like To Do

The key is to have a system to help you distinguish quickly and at a glance between the action items you have to do now, those that are coming due soon, and those proactive things you want to do—these can include your big-picture goals.

Your system will be personal to you, but here's an example of how you might do it: Put two asterisks beside your Must Do Now items, put one asterisk beside Must Do Soon tasks, and put no symbol beside the Would Like To Dos. It might look like this:

*\*\* Finish weekly status report for sales meeting (due end of day)*  
*\* Prepare for demo at XYZ Company (set for Thursday, 4pm)*  
*Improve cold-call phone script*

Even if you keep several running to-do lists—one in your notebook in your laptop bag, another in your car, a third on your desk in the office—you can use this system for all of these lists. That way, you'll always know at a quick glance if you have any Must Do Now tasks just by looking for asterisks.

This is also an effective method to make sure you don't spend half a day working on a Would Like To Do task while you're neglecting a Must Do Now item with a deadline later today. If you glanced at your to-do list before you started on any project, the asterisks would alert you that you have something due right away.

Try it. Jot down a Must Do Now (something due today, tomorrow, or whatever seems appropriate to you). Jot down another task that's a Must Do Soon (defined any way you'd like). And jot down one Would Like To Do task.

"Must Do Now" Task: \_\_\_\_\_

"Must Do Soon" Task: \_\_\_\_\_

"Would Like To Do" Task: \_\_\_\_\_

## Distinguish Between Urgent and Important

Examine the task list below. Then place a number in the blank space beside each, to indicate which you'd likely do first, second and third.

- \_\_\_\_\_ Improve cold-call phone script
- \_\_\_\_\_ Complete and send response to Request for Proposal (due tomorrow)
- \_\_\_\_\_ Call back angry client to address his concerns

If they heard that a client was angry and demanded a call back, most people would drop everything to make that call.

Problem is, “angry client” isn’t enough information. What if this is a difficult client who placed a small order with your company two years ago and has been a pain in the butt ever since.

Sure, this might be an important client—and in that case, addressing their concerns might be your top priority. But keep in mind that just because *someone else* deems something an emergency doesn’t mean you have to.

Similarly, what if that second task on the list—respond to the RFP, due tomorrow—was for a real long-shot prospect? Although it seems urgent (due tomorrow), maybe it’s not worth your time. Maybe you’re better off being proactive—crafting a killer phone script even though there’s no due date on that task.

**Remember:** Urgent isn’t always important, and important isn’t always urgent.

## Have Tasks Handy in Case of Downtime

If you arrived at a prospect’s site only to find they had to cancel your meeting—and you had a couple hours before your next appointment—what would you do?

Many professionals treat situations like this simply as frustrating inconveniences—missing the great opportunities they present. Think of it this way: In your battle to find time to accomplish all the things you want to get done, here’s some “found time” you’ve just been given.

Always keep a set of “What If” tasks handy, wherever you go. These might be tasks on your regular to-do list that can be accomplished quickly or away from your work environment. “What If” your conference call or meeting falls through? “What If” you’re kept waiting a half-hour? Maybe you can knock off a couple of “What If” tasks.

Here are some What If tasks you might want to keep with you at all times:

- *Return the phone calls you've been putting off or haven't found time to make.*

(Note: Have these phone numbers written on your What If task list, along with any notes about what you wanted to discuss.)

- *Respond to emails you haven't had time to answer.*
- *Plan the remainder of your day. With this open block of uninterrupted time, new ideas and tasks will occur to you. This is your chance to capture them.*

## Create as Much Routine as Possible

If you find yourself struggling to complete the same tasks over and over again—paying bills, for example, or writing up your status reports—you'll likely benefit from creating routines for such tasks.

*Every Monday evening, 7:00-7:30pm, you'll pay bills.*

*Every Wednesday morning, from 8:30-9:30am, you'll draft your status report.*

Give as many tasks this type of routine as possible. Put them on your calendar as standing to-do items. This way, you won't worry about when to get them done.

Creating routine in your life frees up your brain to be more creative and proactive, because you're not wasting creative energy figuring out when to pay the bills.

**Note:** As we learned earlier, a key to successfully creating routines for tasks is to know how long each task takes you. So make sure that before you've blocked out 1 hour each Monday to pay bills, you've tested that it takes you only 1 hour.

Can you think of any regular tasks that you'd benefit from building into a routine?

Routine Task: \_\_\_\_\_

Routine Task: \_\_\_\_\_

Routine Task: \_\_\_\_\_

Routine Task: \_\_\_\_\_

## Get Up Earlier

If you'd wake up 45 minutes earlier each morning and use that time productively, at the end of a month you'd have created nearly an entire extra day (22.5 hours) to accomplish your tasks. Think of what you could get done in that time:

- Research the prospects you'll be meeting
- Practice your product presentations (in uninterrupted quiet)
- Write letters, memos and emails
- Call prospects or other folks in later time zones (if applicable)
- Prepare detailed itineraries of your day (or week, or month)

And the best part is, early in the morning can be the most productive time available to us all day—fewer distractions, no phones ringing, etc.

### Some tips for getting up earlier

1. Move your alarm clock far from your bed

If it's right beside you, you can simply hit snooze. If it's at the other end of the room, then you have to get out of bed to turn it off. At that point, you're up.

2. Force yourself out of the bedroom

Once you've gotten out of bed and turned off your alarm, you'll be tempted to crawl back into bed. Make yourself walk out of the room—to make coffee, check email, whatever. Now you're up and ready to start getting stuff done.

List some tasks you'd like to accomplish if you had 45 quiet minutes each morning:

Task: \_\_\_\_\_

Task: \_\_\_\_\_

Task: \_\_\_\_\_

Task: \_\_\_\_\_

## Be Audacious

Ever hear of Google’s “20% Time?” It’s a program in which Google employees are encouraged to spend 20% of their time—a day each workweek—focusing on projects or ideas important to them. It doesn’t need to be related in any way to their job. The company also calls this “Innovation Time Off.”

Some of the company’s most innovative and successful tools—including Gmail and Google News—have come directly from employees using their 20% Time.

If you implement just some of the time-management strategies we’ve covered so far, you’ll have more time and energy each day to be productive and proactive.

Why not use that time and energy to be creative, to reach for your “big picture” goals?

Try something audacious each day, each week—as often as you can while leaving yourself enough time and energy to accomplish your other important tasks.

Some audacious projects and tasks to boost your sales and even your career:

- *Try out a completely different cold-call pitch on 50 prospects*
- *Book yourself as a speaker at a major industry event*
- *Get onto local radio as an “expert” in the field of your product or service*
- *Write an informational article for your industry’s major publications*

Try it. Jot down any big ideas you’ve had for getting more sales, rising in your career or otherwise improving your life—but which you haven’t had time to try.

(Remember to write these down not only as complex projects but also as tasks—next actions you can take to make progress toward the goal.)

Audacious Idea: \_\_\_\_\_

Audacious Idea: \_\_\_\_\_

Audacious Idea: \_\_\_\_\_

Audacious Idea: \_\_\_\_\_

Audacious Idea: \_\_\_\_\_

## Using Technology to Your Advantage

Cell phones, email, electronic calendars, and other technology should *enhance* your productivity, not become chores and obligations that keep you from your goals.

Please consider these ideas for making your technology work for you.

### **Use your cell phone proactively—not reactively**

If you're on your way to a prospect meeting, your focus should be on giving a great presentation or having a productive meeting—not your ringing phone.

Create frequent voicemail greetings that explain why you're not available—"I will be in offsite meetings today"—and promising to return the call as soon as you can.

### **Don't keep your instant message program open when you're working**

Instant messaging can be a great method for getting information or answers quickly. It can also be a huge distraction that keeps you from doing your best work all day.

When you're working, stay heads-down and keep all your mental energy on the task at hand. Ignore instant messages—better yet, keep the program off completely.

### **Turn email sound alerts and popup notices off**

Just like instant messages, an alert on your computer notifying you of a new email is a needless distraction from the work you should be focused on.

Remember, you're not a multitasker. You're a great single-tasker, and you don't want to be interrupted when you're trying to be productive and creative.

### **Use your email program's "rules" features to your advantage**

There is one caveat to the suggestion above—to turn off email alerts so they don't interrupt you. You might want to be alerted for certain critical emails, from your supervisor or the CEO, for example.

Most email programs have "rules" features that let you ask to be notified when you receive emails from certain people or with certain keywords in the subject line.

### **Check email only at scheduled times each day**

Tim Ferris, author of *The 4-Hour Workweek*, argues that you should check email just twice a day, more frequently if you encounter emergencies more often.

Put on an auto-responder that explains you'll be checking email only in the morning and again in the afternoon, and promising to respond as soon as you can. Then get focused on doing great work, distraction-free!

### **Create useful subfolders in your email**

If you receive many emails and want to keep them accessible for future reference, create sub-folders in your inbox.

If you have separate folders for Clients, Prospects, Management, Personal, etc., you'll be able to much more quickly retrieve that name or statistic or phone number that's in the 6-month-old email you know you have but can't remember where.

### **Use Windows Desktop (or Apple Spotlight if you use a Mac) for easier search**

Need something on your computer—an old article you saved as a PDF or a name in a spreadsheet or a link in an old email—but you can't remember where you put it?

Download Windows Desktop (free at [Microsoft.com](http://Microsoft.com)) or use Apple Spotlight (also free). These programs let you enter keywords and will search your entire hard drive for the appropriate files. This is a great time-saver—and sometimes a lifesaver!

### **Leave the phone or BlackBerry in your car**

Remember, technology should serve you, should help you get more done.

If you're going into a prospect meeting, don't take your cell phone. The only people important in your world are those prospects.

### **Clean your email inbox**

Your email inbox should contain just tasks you need to complete. Move any emails you want to save, or that don't require action, out of your inbox and into an appropriate subfolder. (See "subfolder" suggestion above.)

This follows the same principle as keeping your workspace organized. Only those items that are part of your current task list should be in your field of view. Anything else is just a distraction.



## 10 Commandments of Effective Time Management

Some of these Commandments restate principles covered above; some are new. But they're all designed to help you take control of your day, free up time to be proactive and creative, reach your big-picture goals—and make you a star salesperson.

**1. Don't trust your memory**

Write down every task, project, goal and idea in a place you check regularly. This frees up precious mental energy, so you can be more proactive.

**2. Do stay focused on the big picture**

Any task should get you closer to your big-picture goals. Keep those goals in mind, and you'll waste less time on tasks that aren't getting you there.

**3. Don't confuse urgent with important**

Just because something demands your attention doesn't mean it's important. Assess whether an "emergency" truly merits the time you'll need to give it.

**4. Do get up 45 minutes earlier**

This will actually free up almost a full day of productivity each month. Best of all, early-morning time can be your most interruption-free and productive.

**5. Don't Suffer from "Checkoff-itis"**

This is the tendency to add items to your to-do lists for the thrill of checking them off. Focus only on the tasks that get you closer to your goals.

**6. Do pay attention to your physical self**

You don't work well if you don't feel well. Keeping a healthy lifestyle—with exercise, good diet and sufficient time to unplug—is critical to your success.

**7. Don't multitask**

Multitasking essentially means doing several things *badly* at once. Focus all of your energy on one thing at a time—and everything you do will be better.

**8. Do tune out interruptions**

Turn off your alerts on new email, don't check voicemail or email, and say no to any other disruptions when you're heads-down working.

**9. Don't try to "do" projects**

Always break your complex projects into smaller, actionable tasks. This is truly the only way you can be sure you'll take action and get the project done.

**10. Do try audacious things**

To make real improvements in your career, you need to try new things. Use your time to try audacious, big-picture ideas—and make change happen!

## Recommended Further Reading

### **Books**

*Organizing from the Inside Out*

Author: Julie Morgenstern

*Time Management from the Inside Out*

Author: Julie Morgenstern

*Getting Things Done*

Author: David Allen

*Ready for Anything*

Author: David Allen

*The 4-Hour Workweek*

Author: Timothy Ferris

### **Websites**

*43 Folders*

[www.43folders.com](http://www.43folders.com)

*Mind Tools*

[www.mindtools.com](http://www.mindtools.com)