

Time and Resource Management

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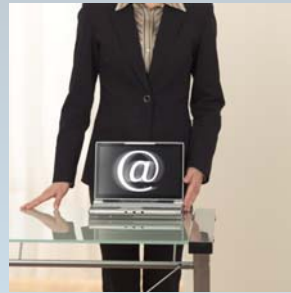
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Self-examination

- ▶ If you were to fault yourself in one of three areas, which would it be?
 - The inability to prioritize?
 - The inability or desire to organize around those priorities? - or-
 - The lack of discipline to execute around them, to stay with your priorities and organization?

Self-examination

- ▶ How often do you
 - Check e-mail?
 - Check voicemail?
 - Follow stocks/current events on the web?
 - Switch projects?
 - Have visitors in your office?
 - Take a coffee break?



References

- ▶ S. Winston, "The Organized Executive"
- ▶ Karel Pollard, "Managing your Priorities and Workload"
- ▶ Steven Covey, "The Seven Habits of Highly Effective People"
- ▶ www.hardatwork.com, "Making the least of interruptions"

Discussion Topics

- ▶ Why Organize
- ▶ Time Management Matrix
- ▶ Time Management tips
 - Arranging the workday
 - Dealing with “Paperwork”
 - Delegation
 - “Crisis” Control
 - Disruption Management
 - Effective Meeting
- ▶ Open discussion



Why Organize

- ▶ Take control of ever increasing sources of correspondence
- ▶ Manage a hectic schedule
- ▶ Attempt to get more done in less time
- ▶ Expedite retrieval of filed information
- ▶ Enhance delegation and assignment items

The Time Management Matrix

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

Urgency vs. Importance

▶ Urgent

- Requires immediate attention
- Usually visible
- Insists on an action
- Right in front of us
- Can be pleasant fun, easy to do
 - may lead to putting off more demanding activities
- **But often unimportant!**



Urgency vs. Importance

▶ Importance

- Has to do with results
- Contributes to your mission, your values, your goals, etc.
- Contributes to clients' mission, their values, their goals, etc.
- May be a deliverable, submittal material, etc.

Urgency vs. Importance

- ▶ We determine importance (internal factor)
- ▶ Urgency is usually determined by someone else (external factor)

The Time Management Matrix

- ▶ Type I Activities:
(urgent and important)

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

- ▶ **Crises**
- ▶ **Pressing problems**
- ▶ **Deadline-driven projects**

The Time Management Matrix

- ▶ Type I Responses:
(urgent and important)

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

- ▶ **Stress**
- ▶ **Burnout**
- ▶ **Crisis management**
- ▶ **Client frustration**
- ▶ **Always putting out fires**



The Time Management Matrix

- ▶ **Type II Activities:**
(not urgent, but important)

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

- ▶ **Prevention**
- ▶ **Relationship building**
- ▶ **Recognizing new opportunities**
- ▶ **Planning**

The Time Management Matrix

- ▶ **Type II Responses:**
(not urgent, but important)

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

- ▶ **Vision, perspective**
- ▶ **Balance**
- ▶ **Discipline**
- ▶ **Control**
- ▶ **Few crises**
- ▶ **Routine client interaction**



The Time Management Matrix

- ▶ **Type III Activities:**
(urgent, but not important)

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

- ▶ **Interruptions**
- ▶ **Some calls**
- ▶ **Some mail, some reports**
- ▶ **Some meetings**
- ▶ **Pressing matters**

The Time Management Matrix

- ▶ **Type III Responses:**
(urgent, but not important)

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

- ▶ **Short-term focus**
- ▶ **Crisis management**
- ▶ **Feel victimized, out of control**
- ▶ **Strained relationships**



The Time Management Matrix

- ▶ Type IV Activities:
(not urgent and not important)

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

- ▶ **Trivia**, busy work
- ▶ **Some mail**
- ▶ **Some phone calls**
- ▶ **Time wasters**



The Time Management Matrix

- ▶ Type IV Responses:
(not urgent and not important)

	Urgent	Not Urgent
Important	I	II
Not important	III	IV

- ▶ **Avoid communication** with clients/
co-workers
- ▶ **Make work** to delay more challenging tasks
- ▶ **Be dependent** on others or institutions for
basics
- ▶ **Loss** of client

The Time Management Matrix – *Lessons Learned*

- ▶ We **react** to **urgent** matters
- ▶ Important matters that are **not urgent** require more **initiative**, being **proactive**
- ▶ *If we don't have a clear idea of what is important, we are easily absorbed in responding to the urgent*

Plan your work day before starting

- ▶ Make a “to do” list and stick with it
- ▶ Schedule difficult tasks during your peak energy time
- ▶ Handle “real” crises immediately
- ▶ Avoid procrastination
- ▶ Know your strengths and weakness
- ▶ Be punctual to meetings
- ▶ Learn to say “no”



Arrange the Workday

- ▶ Who needs to do what by when?
- ▶ Developing a task list/priorities:
 - What needs to be completed this month/week/day?
 - Is it important, urgent, or both?
 - Once you've made your list, prioritize, find the critical path
 - By deliverable, due date, client, resource availability, etc.
 - Beware of timewasters

Deal with the “Paperwork” Crisis

- ▶ Use a TRAF technique
- ▶ What to hold on to
- ▶ Block time during the day to “process” paperwork
- ▶ Track complex actions
- ▶ Desk check



Deal with the “Paperwork” Crisis

- ▶ TRAF = Toss → Refer → Act → File → or, Read (really read)
- ▶ Hold only those items that require further thought or complex action
- ▶ One hour in morning, noon, late afternoon? ... or sub-blocks of time throughout the day!

Delegate

- ▶ The key to successful delegation is appropriate delegation!
- ▶ Before delegating, ask yourself:
 - Why am I delegating this task?
 - Is the task appropriate for the recipient?
 - Are there learning/training opportunities?
- ▶ When delegating:
 - Clearly communicate the task and expectations
 - Timely delegation – delegate important tasks, not urgent ones!
 - Set a realistic deadline
 - Be available for questions and assistance
 - Give praise and credit

Control Crisis

- ▶ **Manage the damage and get back on track**
 - Alert your project manager/team early
 - Meet and assess the damage
 - Explain the problem
 - Recommend a course of action
 - Plan preventive measures for next time
 - Take responsibility for rescheduling

Control Crisis

- ▶ **Be proactive**
 - Don't let someone else's lack of planning become your crisis
 - Anticipate problems, control risks
 - Guide your clients through the process – you probably know more about the process than they do
 - Set realistic deadlines
 - Look to co-workers for ideas on how to be more efficient

Minimize Disruptions

- ▶ Know your priorities
 - List the most important activities
- ▶ Get to interruptions before they get to you
 - Set aside time to meet with team members
 - Have people bring solutions with their questions
 - Figure out a way to remove distractions
 - Turn off e-mail notification
- ▶ Stand up for your time
 - Hold meetings somewhere other than your office
 - Find a place to concentrate

Minimize Disruptions

- ▶ Maintain your workplace environment
 - Keep your office clean and organized
- ▶ Put your schedule to work for you
 - Schedule appointments with yourself
 - Schedule phone, return calls
- ▶ Respect the time of others
 - Think before you interrupt someone
 - Let people know their time is valuable to you

Have Effective Meetings

- ▶ Have an agenda
- ▶ Have clear goals and direction
- ▶ Start and end on time
- ▶ Meet with key people
- ▶ Keep things on task
- ▶ Facilitate the meeting discussion
- ▶ Assign action items



Discussions