3 Classic Time Management Systems & How They Can Work for You and Your Clients

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Overview

• Why Time Management Matters to Professional Organizers

• Why I Chose These 3 Systems

• A Few Notes

• Getting Things Done

• Franklin Covey

• The Now Habit

• Q&A
Why Time Management Matters to Professional Organizers (No Matter Who You Serve)

- Disorganization around time and tasks often goes hand-in-hand with other types of disorganization, both at home and at work
- As with other organizing projects, clients often attempt to learn and implement time management systems on their own, with wildly varying degrees of success
- There is simply not one time management system/methodology that will work well for every client; familiarizing yourself with multiple systems will let you recommend one (or a combination) that's the best fit
- Improving our own time management skills makes us better role models for our clients

The World Isn’t Wanting for Time Management Systems

Books: "time management"

Related Searches: cash flow, getting things done, time management books

Showing 1 - 12 of 17,073 Results
Why I Chose These 3 Systems

- They’re among the most familiar “classic” (i.e., more than 10 years old) systems to many POs and clients
- There are guides to them available, either as books or as related products
- They have staying power and still feel relevant today

What We’ll Look at for Each System

- In a Nutshell: The 10-Word Overview
- Provenance & Pedigree
- Major Tenets
- Required/Recommended Tools
- What’s Flexible & What’s Not

- What’s Missing?
- Great for/Not So Great for...
- Try It
- Service Ideas
- Where to Learn More
A Few Notes

- Each of these systems is complex enough to merit its own seminar; what we'll look at today is a very high-level overview.

- There are books, blogs, websites, podcasts, in-person trainings, and plenty of other resources that will give you a fuller picture of each system and to gain more in-depth knowledge of those that interest you.

Getting Things Done: In a Nutshell

Out of your head; into a trusted system; review religiously.
Getting Things Done: Provenance & Pedigree

• Based on the book of the same name by David Allen (2001)

• Inspired by Allen's work as a consultant and corporate trainer in the 1980s & 90s

Getting Things Done: Major Tenets

• A major cause of inefficient work is trying to hold too much information (especially about our tasks, projects, and areas of responsibility) in our heads; having a “mind like water” allows for “stress-free productivity”

• To get up to 50,000 feet (your life goals and priorities), you need to start with a clear runway (day-to-day tasks, projects, and processes)

• “Relaxed control” entails clearly defining outcomes & projects and the next actions to move them forward, and also having a “trusted system” to capture reminders about projects and actions, which you must review regularly
Getting Things Done: Major Tenets (continued)

• **Collect**: Do a sweep of your home, office, calendar, and mind to identify and capture (on paper or in some other physical form) every “open loop” in your life

• **Process**: Go through what you’ve collected and ask, “Is it actionable?” If no, toss it or file it for reference or later action; if yes, decide the very next action, then do it (if under 2 minutes), delegate it, or defer it

• **Organize**: Get actions/projects onto lists by context or into your calendar

• **Review**: Take time each day to review calendar and action lists; once a week, review and update action lists, projects, calendar, etc.

• **Do**: Choose actions based on context, time available, energy, and priorities

Getting Things Done: Required/Recommended Tools

• GTD is emphatically “tool agnostic”: there’s no one particular brand/type of tool required to successfully implement it

• What’s required:
  ✦ A physical **Inbox**
  ✦ A **collection tool** that’s with you at all times
  ✦ A **list-making tool/program**
  ✦ A **calendar**
  ✦ A **filing system**
Getting Things Done: What’s Flexible & What’s Not

**Flexible**

- Works equally well with paper and electronic tools
- Lists/contexts are completely customizable
- Areas included within Weekly Review are customizable

**Not Flexible**

- Weekly Review is a critical piece of the system; without it, things can quickly fall apart

Getting Things Done: What’s Missing?

- Very little information about and advice for understanding and overcoming procrastination
- (Not a gaping hole, but worth mentioning) For some, the book is not exactly a thrill-a-minute read
## Getting Things Done: Great for...

- People who are consistently overwhelmed by everyday tasks, or by the amount of stuff they have to do
- People who need extra guidance understanding the difference between a project and a task (in my experience, this=almost everybody)
- People who find the idea of one master task list (or even one daily list) overwhelming/unhelpful
- People who have the self-discipline to commit to doing the Weekly Review on their own, or who have someone else (PO, spouse/partner, assistant, etc.) who can help provide that discipline and structure
- In many cases, people with ADD

## Getting Things Done: Not So Great for...

- People whose main time management struggle is procrastination that’s not related to a lack of clarity between projects and actions
- People who can’t/won’t commit to the Weekly Review
- Listphobes
Getting Things Done: Try It

Next Action Thinking

Getting Things Done: Service Ideas

- Help clients with the initial Collect, Process, and Organize phases
- Coach clients through Next Action thinking
- Serve as a Weekly Review coach/facilitator
Getting Things Done: Where to Learn More

• David Allen Company website: www.davidco.com (go to Products→Free Articles)
• GTD Connect: secure.davidco.com/connect
• GTD Times: www.gtdtimes.com
• GTD LinkedIn Group: www.linkedin.com/groups/Getting-Things-Done-Network-GTD

Franklin Covey: In a Nutshell

Get clear on goals and priorities to work more effectively
Franklin Covey: Provenance & Pedigree

• It's complicated!

• Main tenets were outlined in Stephen Covey's *The 7 Habits of Highly Effective People* (1989) as Habit #3: Put First Things First

• Some ideas also existed in Hyrum W. Smith's Franklin Quest trainings, which date to 1984

• All inspired by Benjamin Franklin, who "recorded the attributes he wished to develop, the goals he wanted to reach, and the plans he made for both in a small notebook. Referring to the book daily helped him use his time more wisely and led to many successes."

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Franklin Covey: Major Tenets

• Choosing the right course of action each day/week requires a clear sense of your **life goals and priorities**

• It’s important to set these goals and priorities (via a Personal Mission Statement) **before** planning or carrying out tasks

• For optimal productivity, we should spend the majority of our time on tasks that are **not urgent but important** ("Quadrant II tasks")

• Organizing and planning around Q II tasks involves identifying your key roles, selecting 1-2 goals per role for each week, scheduling time to work on those goals, and reviewing your schedule each day to ensure that you’re focused on the most important tasks, given your priorities
Franklin Covey: Major Tenets (continued)

<table>
<thead>
<tr>
<th>Quadrant I</th>
<th>Quadrant II</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urgent &amp; Important</td>
<td>Not Urgent &amp; Important</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quadrant III</th>
<th>Quadrant IV</th>
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</thead>
<tbody>
<tr>
<td>Urgent &amp; Not Important</td>
<td>Not Urgent &amp; Not Important</td>
</tr>
</tbody>
</table>

Franklin Covey: Required/Recommended Tools

- The system in its current form is really driven by the Franklin Covey Planning System, a set of tools (both paper-based and electronic) designed specifically to guide you through the process of creating a mission and goals, prioritizing tasks accordingly, etc.

- Hypothetically, it's possible to use alternative tools (a plain notebook for goal planning, a calendar, a list management tool, etc.), but much of the structure of the method might be lost.

- Note: there are dozens of different forms available for Franklin Covey Planning Systems; as the company notes, it's important to choose only those that are relevant and useful to you.
Franklin Covey: What's Flexible & What's Not

Flexible

• Can cherry-pick portions of the Planning System based on need and preference

• Can combine paper and electronic system elements (or use all one or the other)

• Priority system will be different for everyone; no standardized prioritization based on criteria like due date or type of task

Not Flexible

• Methodology is a lot easier to use with FC's own Planning System than with other tools

• To be most effective, requires a solid investment of time for goal setting/mission statement creation up front

Franklin Covey: What’s Missing?

• There's not a lot of direction within the system on differentiating between a task and a project

• There's almost no mention of procrastination (causes, effects, solutions) within the Franklin Covey system
Franklin Covey: Great for...

- People who are inspired and motivated by having a clear sense of their life-wide goals and priorities, and who are in enough control of their day-to-day happenings to take the time to set these goals and priorities

- People who can switch fairly easily between big-picture thinking and very detailed thinking

- People who have the self-discipline to review and prioritize their tasks on both a daily and a weekly basis, or who have support and structure from someone else to do this

Franklin Covey: Not So Great for...

- People whose main concern is getting control of their time/tasks as quickly as possible

- People who balk at the idea of doing things like creating a personal mission statement

- People who want to be able to choose the tools they use for time management

- People who struggle with procrastination, and/or with differentiating between tasks and projects

- People who have trouble with prioritizing and decision making
Franklin Covey: Try It

Prioritized Daily Task List

Franklin Covey: Service Ideas

• Guide clients through the process of identifying their goals and values and creating a Personal Mission Statement

• Help clients do a mind sweep of tasks and projects, and then categorize them by goals/values

• Help clients create a prioritization matrix that’s appropriate to them (i.e., a task is an A if it meets criteria x, y, and z; a B if it meets criteria q, r, and s; etc.)

• Work with clients on the weekly review of their tasks and priorities
Franklin Covey: Where to Learn More

- Franklin Covey website (includes links to products and trainings): www.franklincovey.com/te/
- Franklin Covey GO Community: getorganized.franklinplanner.com

The Now Habit: In a Nutshell

Positive thinking and scheduled, guilt-free play=less procrastination
The Now Habit: Provenance & Pedigree

- Tenets outlined in the book of the same name by Neil Fiore in 1989
- Fiore was inspired by his own struggles with procrastination during grad school and by his work as a psychologist (often with others in academia)
- The Unschedule was inspired by behaviorist B.F. Skinner, who used a punch clock when sitting down at his desk to work

The Now Habit: Major Tenets

- Procrastination isn’t the result of laziness or disorganization; rather, it’s a form of self-defense. Taking the time to understand and move beyond the real/imagined threats facing us decreases the need for this self-defense
- Understanding how you procrastinate is as important as understanding why
- Procrastination is tied up with negative self-talk (“I have to...,” “I should...,” “I need to finish...”); changing this talk to messages of choice and commitment (“I will...,” “I choose to...,” “I’ll get started”) helps overcome procrastination
- It's critical to have scheduled time for guilt-free play; our minds respond to the idea of guilt-free leisure time as a reward for short bursts of hard work
The Now Habit: Major Tenets (continued)

- The Now Habit is based around an Unschedule, in which all that’s scheduled is previously committed times (meetings, appointments), free time and leisure, exercise, and routine events (commuting, classes)

- Fill in non-work activities first, to emphasize how much of your week is taken up by other events and commitments (a reminder that you don’t actually have 24 hours in each day to devote to the projects you’re working on)

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
<th>Saturday</th>
<th>Sunday</th>
</tr>
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<tbody>
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<td>Sleep</td>
<td>Sleep</td>
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<td>Wake up; have coffee</td>
<td>Wake up; have coffee</td>
<td>Wake up; have coffee</td>
<td>Wake up; have coffee</td>
<td>Wake up; have coffee</td>
<td>Sleep</td>
</tr>
<tr>
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<td>Shower</td>
<td>Shower</td>
<td>Breakfast &amp; check email</td>
<td>Breakfast &amp; check email</td>
<td>Breakfast</td>
<td>Breakfast</td>
<td>Read paper</td>
</tr>
<tr>
<td>8.30 a.m.</td>
<td>Breakfast &amp; check email</td>
<td>Breakfast &amp; check email</td>
<td>Gym</td>
<td>Breakfast</td>
<td>Breakfast</td>
<td>Breakfast</td>
<td>Read paper</td>
</tr>
<tr>
<td>9 a.m.</td>
<td>Gym</td>
<td>Ask the Organizers</td>
<td>Conference session</td>
<td>Conference session</td>
<td>Conference session</td>
<td>Conference session</td>
<td>Gym</td>
</tr>
<tr>
<td>9.30 a.m.</td>
<td>Travel to meeting</td>
<td>Shower</td>
<td>Ask the Organizers</td>
<td>Conference session</td>
<td>Conference session</td>
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<td>Gym</td>
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<td>BART to SFO</td>
<td>Conference session</td>
<td>Give NAPO presentation</td>
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<td>Airport time</td>
<td>Give NAPO presentation</td>
<td>Give NAPO presentation</td>
<td>Give NAPO presentation</td>
<td>Shower</td>
<td>Give NAPO presentation</td>
</tr>
</tbody>
</table>
The Now Habit: Major Tenets (continued)

• Fill in the Unschedule with work on projects/tasks only after you've completed a 30-minute chunk of effort on them, and take credit only for periods of work that represent at least 30 minutes of uninterrupted time

• Take a break after each chunk of work to reward your efforts and to give your brain time to assimilate what you've just done

The Now Habit: Required/Recommended Tools

• Only required tool is some sort of calendar to use as an Unschedule

✦ Fiore gives a template in the book, but any calendar that's divisible into 30-minute segments would work
The Now Habit: What’s Flexible & What’s Not

### Flexible

- Can use any kind of calendar (paper or electronic)
- No required list-making/-keeping methodology (for better or worse)
- Because it’s on a 24-hour basis, the Unschedule is adaptable to people with non-traditional schedules

### Not Flexible

- Adherence to the Unschedule is critical; can’t schedule things that aren’t meetings, appointments, exercise, or leisure (no blocking out 2-3 p.m. on Monday as writing time, for example)
The Now Habit: What’s Missing?

• Doesn’t even touch on how best to track tasks, how to differentiate tasks from projects, how to prioritize, or how to choose what tasks to focus on at any given time

The Now Habit: Great for...

• People who are mired in procrastination and tend to beat themselves up because of it

• People who respond well to positive psychology (not everyone can stomach the “I’m ok, you’re ok” tone that pervades the book)

• People who already have a way of recording and prioritizing their tasks and projects, but who choke when it comes time to actually do them

• People who respond well to rewards

• In some cases, creatives/right brain thinkers
The Now Habit: Not So Great for...

- People who need a whole time/task management system
- Very linear thinkers
- People whose schedules are such that if something isn’t on the calendar in ink, it’s unlikely to happen
- Workaholics (though I’d love someone to try this method with a work junkie and report back to me!)

The Now Habit: Try It

Seeing the Time Available
The Now Habit: Service Ideas

- Coach clients through the process of overcoming negative self-talk as it relates to time and task management (remembering, of course, that most of us aren't trained mental health professionals)
- Work with clients to help get a realistic sense of how long their tasks take
- Help clients create Unschedules
- Help clients review their Unschedules at the end of the week, celebrating successes and refocusing on priorities

The Now Habit: Where to Learn More

- Articles page on Neil Fiore's website: www.neilfiore.com/articles.shtml
- Litemind's Now Habit summary: litemind.com/the-now-habit/
- Mindmap of the basic ideas discussed in the Now Habit: mappio.com/mindmap/lucianop/the-now-habit
Q&A

Want More?

- Visit www.organizedlife.org/forPOs.html for the latest version of this slide deck, additional time management resources (including how to learn more about these 3 systems), and other stuff I've developed for Professional Organizers

- E-mail me: info@organizedlife.org