

PLANNING AND ORGANISING

OBJECTIVES:

This module will help you to:

- Understand the benefits of better planning and organisation skills
- Understand the priority of different demands on your time
- Set out steps you can take to plan and organise your workload more effectively

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INTRODUCTION

Planning and organising is a bit like: "which came first the chicken or the egg?"

Is planning, and, organising all one thing or are they separate. Why do we always talk about them both as one and the same thing?

Let's look at it this way:

In an ideal world, with no time scales we would not need to organise, just plan.

Plan what we are going to do and when we are going to do it. However, when opportunities exceed resources then decisions need to be made and this is where organising comes in to it - prioritising. So planning is what needs to be done and organising is prioritising when they should be done if there is so much to be done.

PLANNING

Planning, designing, strategising are all very much the same thing. Determining what has to be done.

Planning is a complex process. Some people are good at it and others are not. Some seem to get so caught up in activities and deadlines they claim there is no time to plan. Yet planning is the key to relieve the stress of too little time.

Planning tells us how to get from where we are to where we want to be. It also tells us what resources we are going to need to get there. Planning can be long or short term, you know when to start something and when you should be finished.

Short-term plans usually are today or this week; these could be steps towards longer-term plans.

Planning is about managing:

- what is to be achieved or produced?
- how it is going to be done
- when has it got to be done by?
- who is going to do it?
- what resources will they need?
- what quality should it be?
- what if it does not go as planned

Planning is an endeavour to control or map out the future. Some people will settle for 'what will be will be - when it happens it happens'. These are what are known as 'reactive' people. They wait for a situation to happen and then react to it.

Effective managers however, are 'proactive'. They think ahead and consider:

- how they want things to turn out
- how they may turn out if no action is taken

- what needs to be done to make the future as much like they want it to be

To do all of these things they need to plan. Planning can happen years ahead - we have all heard of things like 'five year plans'. These will usually consider new products, services, and ways of obtaining resources and new ways of structuring an organisation.

However, on a day to day basis, we are more concerned with our plans for the next few days, weeks and maybe months and usually have to plan within the constraints of objectives, staffing, time, budgets, resources etc.,

Planning is really a matter of common sense. Planning at work is no different to planning at home - the same skills are required in how to implement a new product as to how to planning a family holiday or decorating a room or even building an extension - all plans have three major aspects:

1. **Objective** - what are the goals, targets, outcomes or results you wish to accomplish
2. **Implementation** - how are the people and resources to be combined, in what activities over what time period to accomplish the objectives
3. **Monitor and Evaluation** - how is it going, do we need to make any amendments to 1 and 2 if things are not working out as they should?

Use the following checklist to help with your planning:

Activity	y/n	Detail
Am I aware of procedures/constraints/policy etc in respect of my plan		
Do I need the involvement of any other managers?		
Will I need my plan ready for a specific date?		
Do I know what my objective/goal is?		
Do I know what kind of staffing will be needed to do this job		
Do I know what other resources are required?		
Do I need a 'key events' list - showing date/times when things should happen?		
Do I need to undertake 'progress reports'? At what frequency, what method (written or verbal)?		
Do I have a budget for this plan?		
Do I need assistance from any 'experts' i.e. operational/commercial/personnel etc.,		
Do I need to produce a formal presentation of my plan? When is it?		
Can I see any potential 'pitfalls' (check problem solving to assist in this area)		
Will I stop and review my progress? How often?		
When the plan is complete, do I need to communicate it to anyone else? Who?		
Does my plan fit in with other people's plans?		
Has everyone agreed to my plan?		
Can I make sure that everyone concerned knows the total plan, not just their part (e.g. wall chart/flow charts)		
How am I going to keep those concerned involved and informed of progress e.g. meetings/bulletins etc.,		
How am I going to obtain feedback on the success of my plan?		
How will I know if my plan was successful?		

You will find some spare rows on the checklist - use this to add any other items you may wish to check.

ORGANISING

When opportunities exceed resources, decisions must be made. This usually comes back to 'there's not enough hours in the day' so therefore, organising usually goes hand in hand with old father time. Since time can not be manufactured, you must decide what to do and what not to do.

PRIORITISING

Setting priorities (or organising) in the use of time is a two step process:

step one : *listing things that need to be done*
step two : *prioritising the list.*

There are a number of methods you can use to determine your priorities, here's an example:

PRIORITY A - must do. These are critical items. Items fall into this category because of the following criteria:

It involves the customer (therefore our business/profit)
It has a time deadline of today
The Managing Director says do it

All of these items will be urgent - because of the time, or important (splitting these two down can help really prioritise urgent -vs- important if both High 'A')

PRIORITY B - should do. These are items of medium value usually important but not necessarily urgent.

i.e. do not have critical deadlines,

PRIORITY C - Nice to do. These items have the lowest value category. While interesting or fun, they could be eliminated, postponed, or scheduled for slack periods.

Your As, B's, and Cs, are flexible, depending on the date your list is prepared. Priorities will change over time. Today's 'B's may become tomorrow's 'A's as an important deadline approaches. Likewise, today's 'A's may become tomorrow's 'C' if it did not get accomplished in time and/or circumstances change.

Both of these prioritising systems are covered further on in this module.

Time Management plays a very large part in planning and organising. Time is the most valuable resource we have. Nobody can give us any more than we already have. We therefore need to make sure that we use this resource effectively and productively to ensure we live our lives to the full.

"in the absence of purpose, all information is relevant"

If you bear this statement in mind whilst determining whether you should really be doing a task or not, you can be far more specific in your time management because if, what ever it is you are doing, does not have a purpose, then you should not be doing it.

Determining a purpose for what takes up our time will help us to consider what we actually are doing and whether we should be doing it at all!

It is often the way that a person manages their time, which will determine the good managers from the poorer ones. How can somebody who can not manage themselves ever be able to manage other people?

What is time management? Everyone manages their time in very different ways. Some people are very good at it - always on time, never forget, always able to complete tasks before their deadline. Others are quite hopeless. Never clear their desks, work longer than others, always have something to do, need to take work home, have difficulty in locating papers, tire easily - it's endless. Time management systems in their super leather binders, full of useful papers, make us determined to 'stick to it this time' but it seems like it's only the good time managers who can stick to these systems (because they are probably good at it anyway!). We can never work out if it is the system or the people but we can never do it ourselves, no matter how hard we try.

TIME ANALYSIS

We need to find out what it is that is taking up our time before we can manage it. One way is a time analysis.

Acquire a digital kitchen timer and set it for 10 minutes. Every 10 minutes it will go off, then write down exactly what you are doing, even if it is walking down a corridor.

There is no point in trying to do this exercise without a timer because you simply will not remember to do it every 10 minutes.

Depending on your job, the number of different tasks, projects, meetings, etc., that you are involved with, you should after about a couple of weeks be able to analyze all of the different areas and look for some common headings that you could list them under, for example:

1. ADMIN
2. INTERACTION
3. TRAVELLING

Then break them down further into tasks/areas

- | | | |
|-----------|-----|---|
| 1. Admin: | i) | Post: Emails/Junk spam) Mail/Memorandums/
Letters/Invitations/Journals etc., |
| | ii) | Reading: Magazines/Reference Materials |

2. Interaction:
- i) Phone: Incoming/Outgoing
 - ii) Meetings: One on One/ Group/Team/Board/ Development/Project etc.,
 - iii) One on One: Secretary/Dictation/Signing/Instruction Subordinates/Instructions/Appraisals/etc.,
3. Travelling:
- i) Business/Home
 - ii) Meetings/Courses

Then you need to determine how much of your time is spent on each of these areas, for example:

Key Result Area	Task	Time Spent
<u>ADMIN</u> Post	Junk Mail Memorandums Letters Invitations Journals etc.,	5 mins 10 mins 20 mins 2 mins
Reading:	Magazines Reference Material	
<u>INTERACTION:</u> Phone:	Incoming Outgoing	
Meetings:	One on One Group Team Board Development Project etc.,	

SORTING TASKS

Once you know what you are spending all of your valuable time doing, you need to consider whether it is a priority or not. There are a number of ways you can do this.

EXAMPLE 1

Sort your tasks into :

A - must do (they have deadlines/affect customers or your own development)

- B - should do (do not have any critical deadlines but are key result areas and have purpose)
- C - nice to do (no deadlines, do not affect any one, could be postponed, delayed or even dumped - any purpose is not related to customers or own development)

EXAMPLE 2

Sort your tasks into :

urgent - vs - important

urgent = those tasks which have a deadline (the nearer the deadline, the more urgent)

important = those tasks which affect/impact on customers, company, you (the more affected the higher the importance)

You then know what you should be doing and what you are doing that does not really need doing. You may find that it is the areas which are not priority A or B that are the bit's you really enjoy doing - perhaps the social side of the job. Having these makes the more monotonous and mundane work a little bit easier to perform. Maybe in the middle of a tedious task or project you can stop and do one of your more pleasant tasks, which will stimulate you and allow you to recharge yourself.

Do not be swayed by those people who tell you to dump all of your low priority work - keep some of them up your sleeve for when you need them to boost your motivation.

Using systematic approaches to dealing with paperwork can be useful. One method is the three D's :

do it

delegate it
or

dump it

If you are going to DO IT yourself, then use the suggested planning and organising techniques to undertake your tasks.

If you are going to DELEGATE IT look at the Delegation Module in the workbook.

If you are going to DUMP IT - just check out the Decision Making module to ensure you should 'dump it'.

If you are going to do it yourself, you may find some of the following suggestions useful

PLANNING AND ORGANISING SYSTEMS:

BRING FORWARD SYSTEM

A very useful system. Have a concertina file, with the numbers 1 - 31 marked on the top. These numbers represent the days of the month. Whilst going through your paperwork you can use a thick marker pen to write a particular date at the top right hand corner for when you want to deal with a particular item, remember an event etc., For example, you need to attend a meeting on the 22nd January, there is no work required of you prior to that meeting; in a marker pen write B/F 21 JAN on top right hand corner and you/secretary place it in the concertina file in the section marked 21.

Every day all papers in the section marked for 'today's' date should be removed. Go through it and put back any items that are for a subsequent month. So on 21 January you will have the papers to remind you about the meeting on 22nd January.

Of course, before any items are placed in to your bring forward system, they need to be diared, if applicable.

You can also use a bring forward system to help you prioritise your work. Place it in the system to come out on the day that you wish to do the work. If it is no longer such a priority and something else is more urgent then you can put it back in to come out at a later date.

You can also use it to remind you of things like birthdays. Perhaps you could buy all of your birthday cards in one go, write them, then place them in to the system to come out on the relevant day. This way you only do the job once a year instead of every time there's a birthday.

THE DIARY

Using a system such as Outlook calendar can help you manage your time - planning when to do work as well as appointments. Using the task list. Using reminders. Depending on the version you use also using colours to show different appointments priority etc., This is all covered in the separate section on using the Outlook Calendar. If you have secretarial/support ensure that they are able to view and add items to your calendar. You can also access this information using a PDA (Personal Digital Assistant) which allows you to see all the information whilst you are out of the office.

FILING

If resources allow, all filing should be delegated - even though it is easier if you do it because then you will know where it is. Allow the secretary to work to her own filing

system - do not impose your system on to her. It probably will not work. Even if you have to do your own filing, then remember that best systems are the simplest. If there is a chance that a particular paper could be filed in one of two places, then either have two copies of it one in each file, or place a piece of paper in the other file to state where the document is filed.

If a file or document is removed from the filing system, place a post it note to:

- a) know quickly where to put the document back
- b) explain who has the file/document

With much of the correspondence coming via email you need to ensure you save your emails effectively. Think of your electronic filing system in the same way as you do your hard copy filing. Ensure when saving emails that you save them in the correct format to ensure that all attachments are automatically saved. Some formats will not save the attachments and this could be the vital information in the email!

TELEPHONE CALLS

Of course you have to take telephone calls, but try to get all calls vetted through secretary/receptions. Ensure your support staff know when they can put calls through or to take messages and when you will be most likely to be available/return calls.

If you are trying to prepare for an important deadline, ensure that you are not interrupted (unless there is a particular call you are waiting for). You could end up with having to do something other than what you intended if a call comes through.

Arrange for full messages to be taken - explain exactly what you want to know i.e. "date/time/who/subject/when convenient to call back" etc.,

SUPPORT STAFF

Delegation is covered in detail in the 'Delegation' module. However use your support staff as a resource - trust them to be able to do the job properly and show them that you trust them. Let them get on and do the job without you keep checking on how they are doing!

It is important when you delegate that you are clear and concise with your instructions. Use SMART to ensure you have covered all aspects:

Specific	Tell them exactly what it is you want done
Measurable	Give them some measures so that they know if they are going along the right lines, and how they will be able to tell when they have completed the task (use one of the following measures: Cost (budget, targets etc.,) Quantity (how big/small/long/short/total etc.,) Quality (standard of materials/draft/colour/ etc.,) Time (how long it should take to do etc.,)
Agreed	Gain agreement that they know and accept what they are doing

Realistic Ensure the task delegated is within their capability and is achievable

Time The deadline for the task. You may find it useful to use a delegation list to keep a track of what you are delegating. You can use one list for everyone you delegate to or one sheet per person, it is really up to you. Typical headings could be:

date	task	delegated to	review date	date to be completed	completed
01.02.95	Charity Project	Alan Smith	25.02.95	01.04.95	-

You may find it useful to arrange a review date, before the actual completion date to check on how things are going, give further instructions, explain any concerns or questions etc.,

KEY POINTS TO REMEMBER FOR DELEGATING

- It is only the task you can delegate, never the responsibility
- Delegate as often as possible
- Ensure you give clear instructions (use SMART to help you)

DO IT YOURSELF:

What should you actually do yourself then? Things that you just can not delegate are those where you can not offer any guidance, or the task is so detailed that it would be far too complicated to give to someone else. You should never delegate for any of the following reasons, so these will have to be done yourself:

laziness
 don't like the task
 punishment

The following pages contain checklists that may help you to manage your time more effectively.

TELEPHONE CALLS

- ◆ You will have to speak to some people eventually, try to keep the calls to an absolute minimum.
- ◆ Have a set time during the day when you will accept or make phone calls.
- ◆ Get the secretary to vet all calls and deal with as many issues as possible.

- ◆ When making calls and you are asked to hold because the person you want to speak to is perhaps on the other line, have them call you back. You can then use the time you would have spent holding more productively

INTERACTION

- ◆ People will want to see you. If you are too busy, close your door and place a sheet of paper on the door with the following note:

"I am sorry I am not available for the time being. Please leave a message below and I will get back to you as soon as possible:

Name	Date/Time	What would you like to speak/see me about?

When you do become available, you can then prioritise the list using urgent - vs- important to determine whom you will get back to first.

TRAVELLING

- ◆ Take a Dictaphone or mobile phone with recording facilities with you so that you can record those 'brainstorms' you have whilst in a traffic jam, on a train or aeroplane. You can record messages, reminders, draft reports, dictate memos/letters etc., You could perhaps even send a message to someone instead of getting it re-typed if your device has the necessary application.
- ◆ Check your journey - are you using the quickest method to get to your destination. Using satellite navigation systems with traffic reporting can assist. You will also find there are software route planners that will give you alternative directions, sometimes the back roads can be the quickest.
- ◆ Do you actually need to make the journey at all?
- ◆ Check the form of transport you are taking. The cheapest is not always the quickest, for example, the train is far more productive than a car because you can work whilst you are on the move. If you want to do other things whilst you are travelling, you may need to pay a bit more for some comfort.
- ◆ Use travelling time to catch up on some reading - or maybe even some sleeping?

MAIL

Some alternatives to the typical correspondence would be:

- ◆ emails - it may be quicker to send an email than sending a letter/memo
- ◆ take a photocopy of a document that requires a response, write a short reply on the bottom and return/send it to the necessary person.
- ◆ write short notes on compliment slips/post it notes and send them with 'enclosures' rather than a full blown memo or letter

ADMIN

- ◆ Set aside a set time every day to do your admin. Use the multi-part folders (as described earlier) to keep papers easily accessible and in order.
- ◆ Prioritise all your admin work using one of the systems described earlier - A, B or C/urgent - vs - important

READING

You need to be relaxed and preferably undisturbed in order to concentrate on what it is you are reading.

Have a pen and paper handy to make any notes you wish to record. Or, if the reading material is suitable, use a highlighter pen for those important points. It is not necessary to read every single word on a page to comprehend the text. By moving your eyes across the text your brain will register the necessary words in order to identify and absorb the content. In the same way you do not need to say every word in your head.

Only go back and read again the parts that you do not understand, or wish to clarify. Speed-reading is a skill, which comes with practise. Work on it daily to improve. Don't read it at all. If you don't need to know it then don't bother reading it. Don't ready up everything on your particular subject. More than likely one article or book will cover everything you need to know and you will only be reading repetitions if you read more!

DESK

- ◆ Don't keep a set of pending trays on your desk. You will only use them to 'hoard' papers. If you are waiting for a reply, pass the papers to the secretary to place in the Bring Forward File, on a date when you either expect the reply or want to chase a reply.
- ◆ Don't keep any papers on your desk - everything must be filed away.

MEETINGS

- ◆ Do you really need to go? What is the purpose? Could you delegate somebody else to go in your place and ask them to produce a brief report on any issues that were raised?
- ◆ Avoid weekly/monthly meetings that are held for the sake of it.
- ◆ Do not volunteer yourself for any meetings unless it is going to help YOU achieve YOUR goals.
- ◆ If you act as Chair during a meeting, ensure that you set time limits for each item on the agenda - and stick to them!
- ◆ Ensure agenda items affect everyone at the meeting not just one or two people.
- ◆ Don't let the subject sway - keep on track.
- ◆ Don't let people stop you in the corridor for an 'informal' meeting

PEOPLE

- ◆ Start saying NO!! However, if you do say 'no', ensure you can justify it.
- ◆ Don't let others make demands on you, it is your time you decide if it is important or urgent and prioritise accordingly.
- ◆ If you get people 'dropping in' to your office, stand up and walk towards the door as if you were going somewhere - this way they will not be able to sit down and will have to make their call a quick one.
- ◆ Ask the secretary to tell any visitors that you are busy and to make an appointment to come back.
- ◆ Try working from somewhere else - the library or even at home, where you will not have any disruptions and will be able to get on with your work
- ◆ Only see people who have an appointment and you have 'planned' time with them - unless of course the boss wants to see you!

DAILY PLANNING

Fixed time - an appointment/meeting for 2.00 p.m. on Tuesday

Fixed deadline - need to do something by a certain date/time

Natural deadline - before you go home

You may find it useful to have a daily planning sheet. Once you have determined your priorities for the day, you then need to transfer them on to a daily planning sheet, which you can use to help you keep track of your work. You know when your

most productive time of the day is and therefore can plan when things should be done, for instance, if you are best with people in the mornings then this is when you should hold meetings. If you get very tired in the afternoons, then this it is probably not the best time to see people as you will be lacking in patience and concentration. The best time to do your planning is at the end of the previous day. You can ensure that any left over tasks can be scheduled and prioritised in with tomorrow's work. You will sleep far better knowing that your work tomorrow will be undertaken systematically rather than haphazardly - and that you have not forgotten anything urgent! An example of a simple daily planner :

DATE: TASKS:	PRIORITY	COMPLETED
TASKS/PROJECTS: PHONE CALLS: MEETINGS: ONE TO ONE'S: TOMORROW:		

DAILY ORGANISING

- ◆ Organise yourself. Your desk drawers, your filing cabinets, your stationery cabinets, your tools, your manuals, your books, your magazines, your folders, your catalogues, your invoices, your price lists, your journals - EVERYTHING!! If all of your own bits and pieces are in order, you know exactly where you will find things. Even your files 'on disk' should be easy to find. Naming files by number does not help anyone find things. It wastes time to look up in a book which file number 'miscellaneous' or 'sales report' is when if the file was named that in the first place, listed in alphabetical order, then everyone knows exactly where to go - first time!

REVIEW

You need to review your plans during the day just in case you got it wrong! If you did then you will need to re-organise using urgent -vs- important to set the priority.

Problems with equipment - always have a plan for back up

Staff don't turn up - have someone else who can do the job

Get extra work to do - check urgent - vs- important for priority with existing work (and if necessary go back to the delegator and explain priorities)

If your day has gone extremely well - what was it that caused this to happen? Did you delegate effectively/plan effectively? By discovering what it was that made the day go so well you can then carry these techniques over to the next day. You probably have become a better manager of TIME!

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ASSIGNMENTS:

- 1) With your boss, identify TWO problems which arise from the demands upon your time. Make a list of the alternatives, which are open to you.
- 2) Two weeks after finishing this module, complete the following in order to determine what areas are 'still' causing you problems:

Tick the three which cause you the most trouble:	tick
Dealing with unwanted visitors	
Other people's problems	
Telephone interruptions	
Social chatter	
Unproductive meetings	
Travelling	
Too much reading/paperwork	
Endless drafting/re-drafting of memos/letters etc.,	
Putting off difficult/boring tasks	
Rectifying others mistakes	
Mislaying/looking for information/documents	
other:	

WHAT ARE YOU GOING TO DO ABOUT IT?

ACTION	BY WHOM	BY WHEN	COMPLETED

- 3) Ask a colleague who is skilled in planning and organising to observe and analyze your procedures and methods.
- 4) With your boss, analyze a task that was very effective or ineffective. Request coaching to pinpoint behaviours that should be used or modified in the future and to set appropriate controls/follow-up systems that will eliminate ineffective procedures.
- 5) Ask your boss if you may develop a departmental control plan. Review your plan with someone who you feel uses follow up procedures well, before presenting to your boss.
- 6) Prepare and present a training session on Planning and Organising. Often, if you take on a training/coaching role in a subject, you will soon become an expert at it. Ensure you undertake 'evaluations' of your training session.