

Workshop #25

Time Management: Getting Things Done (and Strategic Planning)

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Purpose

The purpose of my workshop was twofold: (a) to discuss some of the common blocks to our using our work time efficiently and (b) a quick look at the process of several strategic planning models.

Main Topics

1. The personal time survey -- Before you can begin making effective use of your time, you need to know exactly where your time is going. Are you spending it, or is all being spent for you? The time survey model I distributed is a simple chart developed by R. Alec McKenzie back in the early 70s. To use it, you keep track of your spent time in 15 minute blocks for up to two weeks...it sounds tough to do, and it is. But, upon summarizing your personal time survey, you'll know exactly where your time is going, and what problem areas you need to concentrate on.

2. Effectiveness enemies -- We covered a number of "time bandits," including the phone, meetings, the recurring crisis (it's time for monthly inventory...let's duck and run), and the art of delegating tasks to others. As always in this seminar, the workshop participants had almost as many good hints and ideas as I did, and we spent a lot of time sharing them. Here's a quick summary of some effectiveness tools we discussed:

- o The Phone -- (a) Have a phone list for screening; schedule your call-back periods, rather than interrupting your work every time a phone call comes in. (b) Don't use trouble phrases, such as "How's the weather?" and don't respond to them if they're asked. They only lead to longer than necessary conversations. (c) If nothing else works to end a conversation, use the infamous phone cut-off. Don't just hang up, but hang up while you're talking. This makes it seem like you were cut off...few people will believe that you'd hang up on yourself. And, they probably won't call back, because your business was already conducted. Use this technique sparingly, and never twice with the same person.
- o Meetings -- (a) Not everyone needs to attend every meeting. Downplay the "honor" aspect of meetings, and always welcome input from those who can't attend due to conflicting work duties. (b) Make the meeting place as uncomfortable as is reasonable...don't let the place itself become the reason some people want to hang around (comfortable chairs, nice decorations, excellent view, etc.). (c) Always have an agenda for the meeting. If the agenda rarely changes, make it into a set format. For example, for a staff meeting, you might first talk about organizational public relations, then move into department reports, and then catch any general information that needs to be given to the staff. Then adjourn.

3. General time savers -- Here we discussed a couple of items that can either directly save you time, or help you manage your time more effectively. They included:

- o 4-part speed letter forms. These are available at most office supply stores. If you use a lot of them, you can have them imprinted with your name and address. You can handle a lot of your correspondence by using these forms. Because there is limited space available, you have to keep your message brief. The form automatically generates carbon copies for both sender and recipient. Plus, if used with a window envelope, you don't need to type an additional mailing label.
- o Personal calendars, such as the Daytimer system. It still surprises me how long I went without using a system like this. I personally like the Daytimer system, but there are a variety of calendar systems available. The hardest part is training yourself to use it every day. Workshop participants were invited to sign up for a free sample package of the Daytimer system, and more than half of the 45 participants did so.
- o We touched on several uses of computers, such as word processing with the personal touch (merge letters), spreadsheets, and some of the newer operating systems that allow several programs to be available with only a few keystrokes required to switch between them. I also discussed the use of "bulletin board" systems, such as MCI mail, for the rapid transfer of information in a format that can be restructured and used without re-keyboarding at the other end. Again, workshop participants were using a variety of equipment, such as fax-boards inside their PCs, and everyone was more than willing to share the pros and cons of their systems.

4. Strategic planning -- By the time we hit this last topic, we didn't have a lot of time left, which means we didn't use our time as effectively as we should have in a time management workshop. However we did cover:

- o What strategic planning is, and how it differs from "regular planning."
- o Who should be involved in strategic planning (it makes a great tool for getting a board of directors involved with an organization, for example).
- o When are the correct times for strategic planning? Not when you're facing a budget crunch or bankruptcy, or when a significant change is about to occur (all new board members, a new Executive Director, etc.).
- o What's the process to go through to arrive at a strategic plan? We followed through one model, although there are many to choose from. For those workshop participants who were interested in looking further into strategic planning, I recommended the book: Strategic Planning and Nonprofit Organizations, by John M. Bryson. Available through Jossey-Bass Publishers, San Francisco.