White Paper

Ten Steps To Greater Efficiency and Effectiveness

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Ten Steps To Greater Efficiency and Effectiveness

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Many managers feel overwhelmed and frustrated by all that they have to do during the course of a typical work day. There just doesn't seem to be enough time during the day to get everything done that needs to be done.

Success in a business leadership role depends on mastering both management and leadership skills. Management refers to those skills associated with getting work done—such as organizing, directing, and controlling. Leadership on the other hand is about creating followers through communication, inspiration, and engagement. The program described in this report only deals with the management side of the equation.

Managers who follow this ten step program will become more efficient and effective in getting their work done. We differentiate efficiency and effectiveness by saying that efficiency is doing things right while effectiveness is doing the right things well.

This program will help you to focus on the most important things and to spend your time working efficiently on the right things rather than just working harder. The pace that the program is implemented is up to the individual. However, there is no reason that all of the ideas in this program cannot be implemented within a thirty day period with concerted effort.

So make up your mind to get started right now.

Remove Clutter

One of the biggest barriers to being effective is all the stuff that gets in our way. People seem to have an inherent fear of throwing something away that might possibly be useful someday. That's why our closets and garages are filled up with so much junk.

The same can be true of our work space. There is a general rule about work space organization—"piles are bad". Piles create inefficiency because of the time we spend trying to find something that we know is there somewhere. With the advent of email, we now have the ability to easily create electronic clutter.

Manufacturing operations learned a long time ago that the best efficiency occurs when work areas are kept orderly and clean. The same applies to an office environment.

Here are steps to take to eliminate clutter:

1. Go through everything in your work area, and remove anything that you have not worked on in the last week. Develop the habit of only keeping things visible in your work area that you are currently working on. Set up a filing system for everything else.

2. Clean out your email inbox. Set up folders for messages that you need to save, and delete the rest.

3. Implement the "Three D System" to keep clutter from reappearing. When any piece of mail or electronic communication comes to you, handle it once. Make an immediate decision to act upon it (Do it), send it to someone else for action (Delegate it), or throw it away (Delete it). If you decide to do it, decide whether it will be done today, by the end of the week, or when you get to it. Set up folders for each of these categories. When your "When I Get To It" folder is full, throw it out and start over.

4. Set up a filing system that makes sense to you. Get in the habit of putting things in a file immediately if you are going to save the item. Periodically allocate time to go through your files and purge what you no longer need.

Make A List

Don't trust your memory to keep track of things that you need to do. Get in the habit of creating and maintaining a perpetual "to do list". At this point, you are not prioritizing or scheduling activities. Just make a list of everything that needs to be done.

After you have created the list, go back through each item and assign a completion date. For example, each month I publish two news-letters. I have to get the text to my assistant for formatting several days before our publishing date. We publish on the 1st and 15th of every month, so this activity has a definite schedule.

If you are having difficulty assigning a completion date to an item on your list, it may be because the task is too complex or ill-defined . I suggest breaking large tasks into smaller tasks that serve as milestones. For instance, I've written a couple of books and am working on others. If I just put "Write a book" on my list, I might have an idea of when I wanted to complete it, but it doesn't help me manage the task. I'll set deadlines for key aspects of the book writing process and include these on my list.

Notice that I have not said anything about prioritizing the list. I challenge conventional thinking on the need to prioritize the list. In real-ity, we can only control what we are working on right now. As I am writ-ing this paper, I have made a priority decision to do this activity at this time. It is because I set a deadline to get it done. Therefore, I believe completion dates are the key drivers of priority and create the urgency.

If you keep your list on an electronic system, such as Outlook, a PDA, or in a spreadsheet, you have the ability to sort by completion date. This becomes your priority list. Also, a completion date is never cast in stone. Routinely review your list and adjust completion dates as needed and re-sort the list.

What should be apparent from this discussion is that tasks without a completion date have no priority. It is OK to have items of your list without completion dates, but recognize nothing will happen on them until you make a commitment to get them done by a certain time. Time creates urgency.

Stop Being a Slave to Technology

Why does technology that is supposed to make our lives easier cause us so much aggravation? We live in an instant communication society where we as managers can be contacted anywhere in the world at any time by almost anybody.

A key to personal effectiveness is for you to manage technology rather than have technology manage you. Let's start with email. Most managers I talk to complain about the volume of email that they receive everyday. And then, if they ever take a week of vacation, the amount that is sitting in their inbox when they return is overwhelming. By making a decision to manage your email, you will be taking a big step forward towards greater productivity and effectiveness.

1. Educate people who routinely send you email, particularly those who work directly for you, on exactly what you expect with regards to email. Clarify the type of information that you do and do not want to receive, how you want to receive it, and how frequently. Too often I see subordinates copying bosses on emails as a way to dodge accountability and responsibility.

2. Remove your name from any routine emails that you receive that you don't want. Use the "opt out" feature if possible, or send a reply requesting to be deleted from an email distribution list. If your email address appears in a long distribution list, ask that the sender to use "bcc:" to keep your identity from being passed on to others.

3. Make sure your spam filters are operational and use the capabilities of your email system to automatically screen email from unwanted senders.

4. This next idea is a big change, but will make a big difference. Only check your email twice per day—once in the morning and once late in the day. When people get an immediate response from you every time that they send you an email, you are communicating and reinforcing to them that you are sitting at your computer waiting for the next email. People will learn to contact you by other means for important stuff if they know you aren't going to respond immediately. This will significantly reduce the amount of unimportant email that you receive.

Completed Staff Work

It is amazing how much time managers can waste doing the work that their subordinates should be doing. Once I was assigned to a manager role responsible for a department with thirty engineers and five group leaders. My predecessors had always had the practice of reviewing and approving every report produced by the engineers. This was after the group leaders had also reviewed and edited the reports. It didn't take me long to figure out that I was taking responsibility for things that the writer should have been responsible for. I was catching calculation, punctuation, and grammar errors. It is human nature that if we know someone else will catch our errors, we will be less careful. I stopped the practice of both me and the group leaders editing reports. The engineers were responsible and accountable. All I wanted to see was the summary.

Make it clear to your staff that you expect all work to be completed. Here are some tips to make that happen:

1. Give very clear directions and state your expectations up front. Clearly define what you expect—don't make the subordinate guess. If you are going to do the job for them, then why bother asking them to do it. I've heard managers say something like, "put something together on this and then let me look at it". Guess who is going to be doing most of the work. Make the assumption that if the subordinate didn't give you what you expected, that you must not have clearly communicated what you needed. This will change your outlook significantly.

2. Never give an assignment without a clearly communicated due date. Just as we talked about in a previous step, no date equates to no priority. "When you can get to it" leaves room for interpretation. If it is not important enough to specify when it has to be done, then it shouldn't be assigned.

3. Always expect assignments to be completed. Never give an assignment and then not follow up to ensure that it has been done. If you fail to follow up, you are subconsciously telling your subordinates that its OK not do some assignments. They'll start guessing which ones you are serious about and which ones you are not.

Stop Procrastinating

Brian Tracy has written a great little book titled *Eat That Frog: 21 Great Ways to Stop Procrastinating and Get More Done in Less Time* (available at www.simpletruths.com). One of the biggest robbers of time and effectiveness is procrastination. Tracy uses the visual image of having to eat a live frog to make his point about procrastination. He has two rules for eating frogs:

Rule #1—If you have to eat two frogs, eat the ugliest one first.

Rule #2—If you have to eat a live frog at all, it doesn't pay to sit and look at the frog for very long.

There is a difference between procrastination and prioritization. Prioritization is a conscious, analytical activity where we decide the order in which we need to do things. We usually start each day with a good idea of the important things that we know that we should get done. Procrastination is throwing out the list, and working on the things we like to do or want to do, in lieu of the things we need to do.

Here are a few suggestions to help you overcome procrastination:

1. Put a visual in work place that reminds you not to procrastinate. Nike has a great slogan—"Just Do It". I know people that have put the Nike logo on their desk as a reminder.

2. Do the task you most dread first. Think about how much time you waste worrying about something that you face. You probably spend as much time worrying about it or trying to figure out how not to do it, as it would take to go ahead and get it done. I worked with a customer service department where the general practice was to wait until late in the day before calling the most difficult customer. When they changed and began to do this first, the whole attitude and morale of the department changed for the better.

3. Keep score. Monitor how often you put off tasks that you know you should have done, but procrastinated. Measure your progress as you get better.

Make the Phone Your Friend

Your phone is another piece of technology that can help you be more effective if managed properly, or can be a source of stress and distraction if improperly used. Probably the biggest hurdle we have to get over is that conditioning we have, like Pavlov's dog, to immediately jump and answer the phone every time it rings. Not every phone call you receive, either on a land line or your cell phone, requires your immediate attention.

One of the greatest inventions that can help manage your phone is Caller ID. If you have this feature on your phone, use it to screen your calls. I never answer the phone if the caller ID says "Unknown Caller", "Blocked Caller", or is a number I don't recognize. And amazingly, these people never leave me a message.

Voice mail is a great tool if used wisely. However, it is always not the most efficient course of action to have all calls go to voice mail. If you receive a call, recognize the person who is calling you, and it will not interrupt something important that you are doing, it is best to take the call. It takes much less time to answer the phone, than it does to listen to voice mail and then attempt to connect with the other person.

This is a personal value of mine, but I will never interrupt a conversation that I am having with someone to take a phone call. I remember a recent time where I was standing in line to check into a hotel and the desk clerk kept stopping what he was doing with me to answer the phone. After the third time, we had an on-the-spot crash course in customer service and courtesy.

Check voice mail regularly, but return non urgent phone calls at one or two specific times during the day. The best time to catch people is usually early in the morning or late in the afternoon. Also, get in the habit of "batching" phone calls. Rather than call someone several times a day with small issues, make a list and cover them all with one phone call.

Avoid lengthy unproductive conversations. Politely, but forcefully keep people on track and end the call if there is no more business that needs to be discussed.

Meetings

One estimate that I saw said that 25 million meetings take place in corporate America each day, and roughly half of that time is wasted. The most common complaint I hear from lower and mid-level managers is that they spend too much time in meetings. When asked what the biggest time waster was, they overwhelming will say meetings. Yet meetings are vital to managing an organization—so the answer is not to eliminate meetings, but rather manage them better.

Here are a few tips that I have found will make meetings more productive:

1. Unless it is a true emergency, meetings should be scheduled with enough advance warning to allow participants to prepare. Think about how many hastily called meetings you have attended where it was the clear that the information needed was not available, so the outcome of the meeting was to have another meeting.

2. Constantly review "standing" meetings to determine if they are still needed. The tendency is to initiate a routine meeting as part of dealing with a specific problem or issue, then continue the meeting even if the issue was resolved.

3. Have a fixed time limit for a meeting. Meetings are like closets; we will tend to fill them up with stuff as long as the time is there. Make meetings longer than thirty minutes an exception.

4. Start meetings on time. Establish a culture where being late for a meeting is unacceptable. Never allow a meeting to go beyond its stated ending time.

5. Have "meeting blackout" periods where meetings are not allowed except for emergencies. If your company doesn't so this, do this for yourself. Schedule "non meeting" time on your calendar.

6. Don't allow someone else to book your time. I once was at a plant where our assistant booked all the meetings for the managers. I didn't know the purpose of half the meetings I was asked to attend. Once, I took control of this, I was better able to manage my participation.

Monkeys

The late time management guru, Bill Oncken, used a striking visual image to make his point about learning not to take on other people's problems. He would walk onto the stage to begin his time management seminar with stuffed monkeys draped all over his back. He used the monkey metaphor to make his points about time management. Monkeys are simply the next task or step to be done to solve a problem or move a project forward.

Here are a few of his key points about monkeys:

1. Monkeys are lurking everywhere and are looking for people to feed them. If a monkey thinks you will feed it, it will hop onto your back and adopt you. Therefore, you have to be careful in giving monkeys any clue that you might be interested in them.

2. If a monkey manages to jump onto your back, you need to find its rightful owner and return the monkey as soon as possible. Your subordinates have monkeys and are looking for ways to have you feed their monkeys.

3. As a cruel as it may seem, some monkeys don't deserve to live. Sometimes it is best to just shoot the monkey so that no one has to feed it. In other words, some tasks just don't need to be dome.

4. Monkeys shouldn't be allowed to roam on their own with no one having the responsibility to feed them. If there are tasks to be done, each one needs to be assigned to a person—no group or committee responsibilities. If more than one person is responsible, then no one is responsible. Also, make sure that it is clear to the subordinate that they have the responsibility for feeding the monkey. Not you.

5. Monkeys should be insured. Monkey insurance is required to make sure that people make affordable mistakes when feeding monkeys. There are basically two types of insurance—Recommend, then act, and Act, then advise. The first type is appropriate if the misfeeding of the monkey could result in an unaffordable mistake. The second type is used if there is a high degree of confidence that the monkey will be cared for properly.

Give Yourself a Break

Stress is physical or emotional reaction to an event or circumstance that we face. The event itself is not the stress, but rather our response to it. Therefore, all stress is self induced. If something is causing you stress, it is because you are letting it do so. The inability to control our reaction to potentially stressful situations, can ultimately impact physical and emotional health.

A few years ago, I had the opportunity to work with a doctor on time management. In addition to running her practice, she was heavily involved in charitable causes and her church. She wanted help managing her life—her expectation was to find more hours in a day, not to refocus and prioritize her activities. When we got to this discussion on stress, a light turned on in her mind. She accepted the fact that she was the cause of her stress and no one else.

A key change she made was not attempting to schedule every minute in her day. Typically doctors schedule like the airlines—they overbook assuming someone won't show up or cancel at the last minute. She not only stopped overbooking, she also left some unscheduled time during the day. This may seem like a poor business decision in that her billable hours decreased, but in reality her business flourished and got more profitable. She is able to give patients more attention, her staff is more productive and efficient, and she commands a premium fee for her service. And, if she doesn't see you within five minutes of your appointment time, there is no charge for the appointment.

The message in this story is that too many managers equate having every minute of the day scheduled to being important and productive Then they wonder why they feel so drained and beat up at the end of the day Get in the habit of leaving unscheduled time on your schedule. Use it to spend extra time with your subordinates or colleagues, or to do some longer range thinking and planning. Or maybe read an article or chapter in a book that might help you.

Focus on getting the important things done, and then don't be tempted to fill the rest of your time with trivial matters. Work on those neglected essentials such as personal development, building relationships, and long term planning.

The Best Time Management Tool Ever

One of my colleagues showed me a system that he used to keep himself focused on what he needed to do each day. It is the best time management system that I have ever seen and he allowed me to use it in my work as well. While I think it is very important to have a calendar and planning system that you use religiously, that is not what he showed me. What he handed me was simple, yet powerful. I now give one of these to each person I work with.

Let me describe this "magical" tool. It is a plastic folder that holds two index cards. The index cards have the headings "I Am A Person Who:" and "My Goals Are:". Under each heading, there are spaces to fill in your own words and statements.

The power of this magical folder is unleashed when you pull it out and read the cards several times each day. They constantly remind you of the person who you want to be and the outcomes that you want to achieve. I have found that there is no such thing as a time management issue—it's all about priorities and focus. Most of our feelings about being overwhelmed come from not feeling good about ourselves and not having a clear idea of what we want to accomplish. The cards provide a constant reminder of what our true priorities should be.

As William James, the preeminent American psychologist of the latter part of the nineteenth century, said, " People tend to become what they think about themselves". The affirmations that appear on the "I Am A Person Who" card are a constant reminder of who we want to become.

I have found that reading my goals card at the beginning of each day, helps me to be better focused on what I am going to do that day, and helps me to block out distractions. Then at the end of the day, when I read the card again, I can see how something I did that day helped me to move closer to achieving one or more of my key goals.

You don't need a fancy folder to implement this great system. Just find two index cards and get started. Don't hesitate to change or replace the cards as needed.

Key Ideas In This Report

1. Keep only things you are currently working on in your work area.
2. Keep your email inbox empty.
3. Implement the Three D System
4. Set up a filing system
5. Make an ongoing to do list.
6. Assign completion dates to tasks.
7. Prioritize by completion date.
8. Educate people on your email preferences.
9. Unsubscribe from unwanted email.
10. Filter your email.
11. Check email twice a day.
12. Give clear instructions on assignments.
13. Each assignment has a due date.
14. Each assignment must be done.
15. Put a visual reminder to stop procrastinating.
16. Do the most unpleasant task(s) first.
17. Keep score on procrastination.
18. Use Caller ID to screen calls.
19. Never interrupt someone to answer the phone.
20. Answer a call, if possible, rather than send it to voice mail.
21. Return calls once or twice per day.
22. Batch calls.
23. Firmly stop unproductive phone conversations.
24. Schedule meetings in advance.
25. Eliminate unnecessary "standing" meetings.
26. Limit time for a meeting to 30 minutes or less.
27. Start meetings on time.

Key Ideas In This Report
(continued)

28. Have "meeting blackout" periods.

29. Book your own time.

30. Don't accept other people's "monkeys".

31. Ensure the proper feeding and care of monkeys.

32. Don't schedule 100% of your time.

33. Spend time planning, building relationships, and improving your self.

34. Constantly remind yourself of who you want to be and what you want to accomplish.