

Tips & Tactics for Sharpening Organizational Skills

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Beginning With the End in Mind

Part 1

Reflect back on the past 2 weeks. What activities (at work and out of work) gave you the most satisfaction and pleasure? Write down 3.

1. _____

2. _____

3. _____

Now reflect on the past 6 months. What activities (at work and out of work) gave you the most satisfaction and pleasure? Write down 3.

1. _____

2. _____

3. _____

- **How could you organize yourself to do more of the above?**
- **What specific steps would you have to take to have more time for the above?**

Part 2

My specific plan: _____

My specific behavior: I will _____ **for** _____ **minutes per day.**

OR _____

THE TIME MANAGEMENT MATRIX

	Urgent	Not Urgent
I M P O R T A N T	I ACTIVITIES: Crises Important calls Pressing problems Deadline-driven projects	II ACTIVITIES: Planning Prevention Relationship building Communication Training others & yourself Recognizing Opportunities Recreation
N O T I M P O R T A N T	III ACTIVITIES: Interruptions Some calls Some mail, some reports Proximate, pressing matters	IV ACTIVITIES: Trivia Busy work Some mail Some phone calls Time wasters Pleasant activities

Question: Where do you spend the most time?

**Your Goal: Spend more time in Quadrant II, to lessen time spent in Quadrant I.
Spend less time in Quadrants III and much less time in Quadrant IV.**

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Time Management Quiz

This quiz will help you identify trouble spots and pinpoint areas of your life where you're wasting time, resources, or energy or areas where you are not using time as efficiently as you could. Read the following statements and select the answer from the following key:

A = Always

B = Most of the Time

C = Often

D = Once in a While

E = Never

- _____ 1. I am swamped with paperwork.
- _____ 2. I let journals and/or newspapers pile up without reading them.
- _____ 3. My desk is covered with piles of papers, files, and books.
- _____ 4. I often spend more than 30 seconds looking for items in or on my desk.
- _____ 5. I have difficulty focusing because I feel overwhelmed.
- _____ 6. More paper comes into my office than goes out.
- _____ 7. I find it difficult to throw things away.
- _____ 8. I am late for meetings or appointments.
- _____ 9. I miss appointments.
- _____ 10. My "In Box" is always full.
- _____ 11. I misplace small pieces of paper and sticky notes.
- _____ 12. People put items on my chair or computer so I'll be sure to see them.
- _____ 13. I work at another place because my desk is so messy.
- _____ 14. I struggle with conflicting deadlines and demands on my time.
- _____ 15. I feel discouraged or frustrated by my work environment.
- _____ 16. I don't know which are my real priorities.
- _____ 17. I start one task and then get distracted and move to another one.
- _____ 18. I can't find items that I file or put away.
- _____ 19. I dread starting a new project because of many loose ends to tie up on others.
- _____ 20. I find that I have agreed to do things for others that I really do not want to do.
- _____ 21. I wish there were more hours in the day.
- _____ 22. I am tired and do not get enough sleep.
- _____ 23. My computer files are disorganized and not backed up.
- _____ 24. People interrupt me or want to talk when I need to work.
- _____ 25. I seem to have too much to do.
- _____ 26. I forget to return calls or take a long time to answer email.
- _____ 27. I am known as absent-minded.
- _____ 28. I feel stressed because I am disorganized.
- _____ 29. I underestimate the time it will take to do tasks.
- _____ 30. I work right up to the last minute on deadlines.

Quiz 2

Scoring

In the spaces below, write the number of times you responded with each letter.

A _____ B _____ C _____ D _____ E _____

Now take a look at which letter(s) you chose most often.

A's and B's are your problem areas. These are the areas in which you usually find yourself to be in trouble. A large number of A's and B's will tell you much about how much energy and commitment you will need to get organized and take control of your time.

C's and D's are not real problems. Everyone is occasionally unprepared or disorganized, no one is perfect.

E's are your strength areas.

Adapted from: McGraw, Nanci. (1995). Organized for Success! Mission, KS: SkillPath Publications, pp. 10-14.

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Paper Clutter Control Tips & Tactics

- **#1 Tip – Start a Ripening Drawer or Box.**
- **#2 Tip - The best clutter control is to make prompt decisions!**
Clutter is postponed decisions. There are 4 possible decisions (TRAF System):
 - Toss/recycle it!
 - Refer it!
 - Act on it!
 - File it!
- To win back your time is to win the battle with paper.
- Your desk is among the most important arenas of your life. Take charge of your desk, and you take charge of your time.
- As often as possible, keep your desk clear of everything but the one task at hand.
- Refine your work area so you can find whatever you're looking for easily.
- Make friends with your trash & recycling bins, keep close and feed often.
- When you pick up a piece of paper, ask:
 - What is it?
 - Why do I have it?
 - What am I going to do with it?"
 - If you don't have a good answer, recycle it.
- If you need to keep a document, put it in a file folder.
- If you don't need a document any longer, recycle it ruthlessly!
- Items to discard:
 - Outdated manuals (software & hardware), publisher's catalogs, flyers, brochures, and promotional materials.
 - Back issues of publications you haven't touched for 2 yrs.
 - Drafts, earlier versions, outdated versions of letters, memos, reports, and documents (unless needed for legal reasons).
 - Scraps and tidbits of information, used Post-It notes, and the like that have accumulated around your desk, in your wallet, and elsewhere.
 - Lingering stacks of irrelevant paper. Keep what you need, discard the rest.
- 7 Point keeper test:
 - Would I regret it later if I threw it out?
 - Is this the only copy?
 - If needed, could I get another copy?
 - Would it be difficult to replace?
 - Is it a valuable or a legal document?
 - Do I just want to keep it & do I have enough space?
 - What is the worst that can happen if I didn't have it?
- Straighten your desk at the end of each day.
- Use color-coded file folders for multiple projects, action files, & dated materials.

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Email Tips & Tactics

- ❑ # 1 TIP !!! Spend 15-30 minutes on an important task before you check email.
- ❑ #2 TIP!!! Create a “To Answer” folder when you are pressed for time so you don’t have to hunt for these emails later.
- ❑ Keep the message simple, easy to read, and short - one screen should do it.
- ❑ If you are including a list, use bullets or numbers, which are easier to read.
- ❑ For longer messages, attach the file. Write a brief, but thorough, description of the message in the subject line and a more detailed description in the message.
- ❑ If you are attaching a file, add a description of the purpose of the document, what the person should do with it, and the date you need a response.
- ❑ Check your inbox regularly so messages don’t pile up. Delete or file messages you have answered, or don’t need an answer. Create away message & use it!
- ❑ Print out important messages and file them immediately.
- ❑ Use email at work only for work related messages. Socializing should be handled in person or on home accounts. Discourage friends/family from using your work email to send jokes, gossip, etc.
- ❑ If your computer beeps (or makes another noise) to signal that a message has arrived, turn this feature off, or turn email off.
- ❑ If you are feeling hurt, angry, or upset, resist the urge to send off a “flaming” email. This could touch off a “flame war” with a supervisor or colleague, which you could regret later. Remember, email doesn’t go away easily and it can be printed out and placed in your personnel file or forwarded to others.
- ❑ If you are getting too much email:
 - Set aside specific times in the day to go through your email.
 - Automatically route some email to files (e.g., listserv items).
 - It is not necessary for you to respond to every message you receive. Use the delete key for unimportant email.
 - Respond to your supervisor’s email first.
 - If you are getting copied (cc) on messages that don’t specifically apply to your job, ask to be removed from these lists.
- ❑ CAUTION! If your message is important, controversial, confidential, or could easily be misunderstood, use the phone or set up a face-to-face meeting.

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Telephone Tips

- ❑ Set aside a specific time to return calls, try to minimize impulse calling.
- ❑ Turn off your cell phone when possible.
- ❑ Before you pick up the phone to make a call:
 - List items for discussion, arrange in priority order so that the most important items will be discussed first.
 - Have at your fingertips the files or other papers for reference.
- ❑ Before you pick up a ringing phone:
 - Ask yourself, should I let the voice mail pick up this call?
 - Watch out for 3 little words: “Are you busy?” or “Got a minute?”
- ❑ Make a card of important or frequently called numbers and keep it by your phone.
- ❑ Change your message when you are away on vacation so callers know when to expect a response.
- ❑ Use your rolodex/address book/PDA to keep track of phone numbers and other important information.
 - Avoid writing numbers on slips of paper
 - Write number directly into your PDA/rolodex when possible.
- ❑ When caught in “phone tag” refuse to play. Don’t wait for a return call, call back later, first asking when the person you want to speak to will be available.
- ❑ When you get a longwinded caller, be firm but polite about your need to end the conversation. Tell them you only have a minute, or:
 - There is someone in your office so the conversation will have to be short.
 - You have to take a call on the other line.
 - You have to go to a meeting.

Voicemail Tips and Tactics

- ❑ Let calls go to voice mail when working on top priorities.
- ❑ When you listen to your messages, speed them up if possible.
- ❑ If callers are longwinded, limit the amount of time that a person can leave a message if possible. In either case, in your message ask the person to be brief.
- ❑ Keep a pad (or better yet, a phone log) and pencil ready for names & numbers.

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