
Learning Activity 14-1. Introductions

OBJECTIVES

The objectives of this learning activity are to

- become comfortable in the learning environment by meeting others in the class
- determine the biggest challenges in priority and time management to the learners.

MATERIALS

- none

TIME

- 15 minutes

INSTRUCTIONS

1. Explain that this is an opportunity to meet everyone.
2. Invite attendees to introduce themselves; they should each tell their name, department, title, and one of the biggest time wasters that they encounter on a regular basis. These could be such items the telephone, emails, poorly organized meetings, lost records, disorganized information, or visitors.
3. List their time wasters on a flipchart page.
4. Post the page and note the sections of the workshop that will address their specific time wasters.
5. If you do not have a section that addresses their challenge, you can ensure that it is included in the session summary.

Learning Activity 14-2. Self-Assessment

OBJECTIVES

The objective of this learning activity is to

- help participants assess their areas of strength and potential in the development of their priority management skills.

MATERIALS


For this activity, you will need

- Assessment 14-1: Self-Assessment
- pencils.

TIME

- 20 minutes

INSTRUCTIONS

1.  Introduce **assessment 14-1** and explain that this is an opportunity for participants to assess their priority management skills and the areas they can focus on developing in this session.
2. Remind the participants that no one has to share their responses, so they should be completely honest in the assessment.
3. Give the learners time to complete the assessments.
4. Conduct a debriefing discussion, using the questions provided.

DISCUSSION QUESTIONS FOR DEBRIEFING

- What areas would you like to focus on developing?
- Did you find that you have strong priority management skills in certain areas? If so, which ones?

Learning Activity 14-3. Mastering Your Time

OBJECTIVES

The objective of this learning activity is to

- apply the rules of time management to determine the priority of standard daily tasks.

MATERIALS











For this activity, you will need

- PowerPoint slides 14-7 through 14-19.

TIME


- 20 minutes

INSTRUCTIONS

1. Describe the time management process as you go through the slides and explain each of the five steps.
 -  Show **slide 14-7** and explain that time management answers many needs in our lives, especially the need to feel more in control, make the most of every day, and to accomplish what we set out to do. Ask for any specific areas that are most important to the learners. Allow brief discussion on this.
 -  Use **slide 14-8** to go through each of the points on Step 1: Prioritizing.
 -  Discuss **slide 14-9**, which presents a model for reviewing work. Go through each item and discuss the questions they can ask to assess each level. For 50,000+ feet: life as a whole, ask, "What is the purpose of your work?" For 40,000 feet: 3–5 year vision, ask, "What will you be doing 3–5 years from now?" For 30,000 feet: 1–2 year goals, ask, "What will you accomplish 1–2 years out?" For 20,000 feet: areas of responsibility, ask, "In what areas do you want to achieve results? For 10,000 feet: current projects, ask, "What are the short-term projects that must be done?" For ground level, ask, "What actions are needed to focus on these projects?"
 -  Show **slide 14-10**, and go through each of the points on Step 2: Analyzing.
 -  Show **slide 14-11** and go through each question that is used to analyze the items on work time logs.
 -  Show **slide 14-12**. Look at the main points for Step 3: Filtering. This is where the learners will begin to determine the priority of items on their task lists.
 -  Explain the filtering categories by using the notes on **slide 14-13**. Give examples for each category. *Urgent and Important* is used in situations where your child sick at school, you have a presentation meeting in one hour, or you fell and injured yourself. *Important and Not Urgent* could mean long-range budgeting, time with family, or continuing education. *Urgent and Not Important* could mean a colleague is showing you vacation pictures, an email pop-up box, or a regular departmental meeting in 10 minutes. *Not Important and Not Urgent* might mean surfing the Internet, watching television, doing the crossword puzzle in the paper, or checking sports scores.
 -  Show **slide 14-14**. Go through the main points for Step 4: Scheduling.
 -  Show **slides 14-15 and 14-16**. Review the scheduling tips listed on both slides. Solicit the learners' input on topics such as avoiding overbooking, flexibility, breaking tasks down, and building in breaks. Why are these items so important to time management and to people's stress levels?
 -  In **slide 14-17**, explain the importance of Step 5: Executing. This is where learners take the steps and implement them to ensure that they take control of their schedule.

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Learning Activity 14-3. Mastering Your Time, *continued*

-  **Slide 14-18** emphasizes how difficult and important it is to say “no.” Remind the learners that it’s not always possible to refuse new tasks, but they can use a daily log and work schedule to show the other party that they take their time management seriously and to show the level of their current workload. That’s another good reason to keep a daily record of events and task list.
- 2. Show **slide 14-19** and use the points listed to summarize this section on mastering their time.
- 3. Explain that the next activity will give them an opportunity to practice these guidelines.
- 4. Conduct a debriefing discussion, using the following questions.



DISCUSSION QUESTIONS FOR DEBRIEFING

- What are your biggest challenges of the items we’ve discussed in this time management overview?
- Which of the steps we discussed will help answer your challenges?
- How would you summarize the main points of how to prioritize tasks?

Learning Activity 14-4. Time Management Practice

OBJECTIVES

The objective of this learning activity is to

- apply the rules of time management to determine the priority of standard daily tasks.

MATERIALS



For this activity, you will need

- Training Instrument 14-1: Time Management Tasks (one copy for each learner)
- Training Instrument 14-2: Prioritization Chart
- participants' list of work tasks for the upcoming week (optional)
- pencils.

TIME

- 45 minutes

INSTRUCTIONS

1. Divide the class into four groups.
2.  Distribute a copy of **training instrument 14-1** and **training instrument 14-2** to each participant, and ask them to take out a pen or pencil.
3.  Review the instruments and explain that each group will follow the instructions on **training instrument 14-1** and work together to practice prioritizing the tasks, using the time management principles that have been discussed. They will also use the notes on **training instrument 14-2** to help them assess the levels of prioritization.
4. Allow 20 minutes for them to do this scheduling. Use the discussion questions to debrief this activity.
5. If you have requested that the attendees bring information regarding the coming week's appointments and tasks, allow them to follow up the practice session by individually working on their personal schedules.
6. As participants work on their upcoming week's schedule, walk around the room to help those who need any assistance with the process.

DISCUSSION QUESTIONS FOR DEBRIEFING

1. Was there any disagreement in your group about the order of your prioritized items?
2. What helped you determine the order of priority?
3. How could you help others learn this process to prioritize tasks and activities?

Learning Activity 14-5. Project Management

OBJECTIVES

The objective of this learning activity is to

- generate a project management plan using a structured, step-by-step process.

MATERIALS






For this activity, you will need

- PowerPoint slides 14-22 through 14-25
- Training Instrument 14-3: Project Management Chart
- flipchart and markers.

TIME

- 25 minutes

INSTRUCTIONS

1.  Show **slide 14-22**, which introduces the concept of preparing for your project. Explain to your learners that project management uses the same principles as time management. The difference is that project management requires you to manage your time, as well as schedule the time and resources of those around you who are part of your project team.
2.  Describe the phases of project management, as shown on **slide 14-23**. Defining the project and its scope ensures that you have the resources needed to accomplish the goal. Planning the project means that you must break it down into reasonable goals and set a timeline with deadlines, responsibilities, and resources. Executing the project means you need to monitor and track all those deadlines and resources to ensure that the project is progressing satisfactorily and make adjustments as needed. Closing the project is often ignored, but it's an important step when participants celebrate their success, evaluate what went right or could be improved, and document processes for the next time a similar project is undertaken. Explain that the next two slides show some useful tools for project management.
3.  **Slide 14-24** shows the work breakdown structure (WBS), which is a valuable tool for breaking a project into its smallest steps. A WBS breaks a project into levels, then continues to break each level into smaller steps, until the steps are small enough to be manageable.
4.   Show **slide 14-25**, and give each learner a copy of **training instrument 14-3**, to illustrate a basic sample of a project management chart. These charts can be as involved or as simple as the task dictates. They can use software programs or be on office bulletin boards. The main purpose is to have a communication board that reflects your progress on the tasks for the project.
5. If time permits, you may want to walk the learners through a simple project, such as painting a room. First, ask the learners to brainstorm the steps as you write them on a flipchart. Then, ask them to assign priorities to the steps in the order they should occur. Finally, divide the learners into groups, where they will use a chart to create a sample of what the project management chart would look like, using the names of the learners in the room as the responsible parties.
6. Conduct a debriefing discussion, using the following questions.

DISCUSSION QUESTIONS FOR DEBRIEFING

- What were the most difficult parts of this exercise?
- What worked well in your group?
- What if you wanted to create a project plan for a virtual (online) team? Do you have any ideas of how this process might be done?

Learning Activity 14-6. Managing Records

OBJECTIVES

- The objective of this learning activity is to
- create systems for the efficient handling of paper records and documents.





MATERIALS

- For this activity, you will need
- PowerPoint slides 14-27 through 14-37.

TIME

- 15 minutes

INSTRUCTIONS

1.  Show **slides 14-27 and 14-28**. Discuss the items on each slide about managing paperwork and clutter and ask for input on the learners' challenges to managing paper records.
2.  Introduce the three steps of managing paper, as outlined on **slide 14-29**.
3.  Show **slides 14-30 through 14-33**, and review the steps to manage paper: sort, take action, and maintain a routine.
4.  **Slides 14-34 through 14-37** review many tips for handling paperwork. Solicit input from participants on the tips and techniques that work for them.
5. Conduct a debriefing session, using the following questions.

DISCUSSION QUESTIONS FOR DEBRIEFING

- What kinds of paper and records are your biggest challenges?
- Did you get some ideas on ways to cut down the amount of paper and clutter in your workspace? Which ones do you feel will be most useful to you?

Learning Activity 14-7. Problem Paper

OBJECTIVES

The objectives of this learning activity are to

- enable participants to practice sorting paper materials
- demonstrate the effectiveness of handling paperwork efficiently
- build relationships among participants.

MATERIALS


For this activity, you will need

- writing instruments
- Training Instrument 14-4: Paperwork Samples
- materials for small groups to sort provided by the facilitator (for example, scribbled meeting notes, magazine articles, business memos, sample invoices, training handouts, party invitations, and sample reports)
- blank slips of paper or sticky notes (four to six per group).

TIME

- 10 minutes for setup and to form small groups
- 10 minutes for decisions on paperwork on handout
- 15 minutes to sort items in groups
- 10 minutes for debriefing.

INSTRUCTIONS

1. Divide participants into groups of three or four people each.
2.  Give copies of **training instrument 14-4** to all participants.
3. Tell the participants that their group's first task is to review the items listed on the handout. Allow 10 minutes to brainstorm where the items could be stored or where information about them could be recorded for ease of finding them again if needed.
4. After the 10-minute period has passed, give each group four to six blank slips of paper or sticky notes and a stack of materials to sort. Ask the participants to make four piles with the materials, marked: *file*, *toss*, *create appointment or task*, and *read*. Participants may create other sorting categories if they think it is necessary. Allow 15 minutes for this exercise.
5. As the groups are working, walk around the room to check on their progress and answer any questions they may have.
6. When the time is up, begin the debriefing.

DISCUSSION QUESTIONS FOR DEBRIEFING

Take approximately 10 minutes to debrief the exercise around the concept that quickly sorting paperwork and other materials can help us with our time management and overall organization.

1. Review the handout by asking for volunteers to share where they would store or record the listed items.
2. Lead the debriefing into a discussion of what the participants observed during the sorting process. Was it easy or difficult? Did it make sense to them?
3. Ask for the groups to volunteer which items they included in their sorted stacks of materials.
4. What did they gain from doing this exercise?

Learning Activity 14-8. Putting It All Together

OBJECTIVES

The objective of this learning activity is to

- create a plan to continue to develop the priority management skills of your learners.

MATERIALS




For this activity, you will need

- PowerPoint slides 14-39 and 14-40.

TIME

- 15 minutes

INSTRUCTIONS

1. Explain that it's time to ensure that today's session fulfilled the objectives you discussed at the beginning of the workshop.
2.  Show **slide 14-39**. Note the objectives for the day and briefly summarize the ways the class addressed those objectives.
3.  Show **slide 14-40**, which outlines a one-day, one-week, and one-month action plan for the participants to follow.
4. Ask them what happens if they don't immediately use information they get in workshops. (Most of the time they will respond that they'll lose it.)
5. Explain that this is why you'd like them to practice these principles right away so they will retain the valuable insights they've made today.
6.  Go through each item on **slide 14-40**. You can use the items as listed or adjust them to suit your organization or any special areas of time or project management.
7. Ask for their commitment to do these three activities.
8. Conduct a debriefing discussion, using the questions provided.

DISCUSSION QUESTIONS FOR DEBRIEFING

- What questions do you have about the techniques we've discussed here today?
- Which of these techniques do you feel will be a useful addition to the methods you use right now?
- Would you like to discuss any other questions or concerns about time management, project management, or pesky paper problems?

Training Instrument 14-1. Time Management Tasks

PRIORITIZE	
A, B, or C	<i>Prioritize the following items as A, B, or C. If you decide you need additional facts to make your decision, you can create them and add them to the Notes line under the task.</i>
	Call Fred to set appointment for this afternoon's meeting. Notes:
	Make flight reservations for business trip next month. Notes:
	Meet with staff on XYZ project due this Friday. Notes:
	Send emails to invitees for meeting next week. Notes:
	Schedule to attend time management seminar. Notes:
	Reschedule overdue doctor appointment. Notes:
	Proofread report that will be sent out tomorrow morning. Notes:
	Visit with staff members. Notes:
	Answer emails. Notes:
	Read article on new business contacts. Notes:

Training Instrument 14-2. Prioritization Chart

PRIORITIZATION OF TASKS	
RATE YOUR TASK BY SEEING WHICH OF THESE STATEMENTS DESCRIBES IT.	SCHEDULE YOUR TASKS IN THIS ORDER.
<ul style="list-style-type: none"><input type="checkbox"/> This is urgent. It needs to be done today.<input type="checkbox"/> This is important. It will affect my family, my career, or my goals if not done today.<input type="checkbox"/> This will lose value if not done today.<input type="checkbox"/> This will cause problems or embarrassment if not done today.	A Schedule these items first.
<ul style="list-style-type: none"><input type="checkbox"/> Someone else is waiting for this to be completed so they can continue a larger project.<input type="checkbox"/> This has a deadline attached to it.<input type="checkbox"/> This is not urgent to do today, but it is a part of a goal that is important to me, my family, or my workplace.	B Schedule these second. If you do not complete them, move them to the next best day to work on them.
<ul style="list-style-type: none"><input type="checkbox"/> This is not highly important or urgent.<input type="checkbox"/> This has no deadline attached to it.<input type="checkbox"/> This is an optional activity.	C These are optional. You can drop these or move them to another day.

A. These items are important and urgent. If you don't do them today, they will lose value or cause problems. These are your high-priority items on your task list. Do them today.

B. These items are important, but not urgent. The deadline may be further off, or they may be developmental tasks that will help you in the long run. If you don't do them today, be sure to reschedule them. If they slip between the cracks, they'll cause problems. As their deadlines approach, they also become more urgent and move into the A category, and you won't have a choice on when to do them anymore.

C. These are not urgent or important. These are often the items that we keep pushing off to another day. Reconsider whether these need to be done at all. If you have rescheduled them three times, chances are these can be dropped from your list.

Training Instrument 14-3. Project Management Chart

Instructions:

- Brainstorm to determine all the steps of your project.
- Place the steps in order in the chart below.
- Estimate how long each action item will take.
- If time is limited, use reverse engineering to determine deadlines by starting with the completion date and then dating each action item from last to first. Remember that other tasks may need to be rescheduled to allow time for completion of this project.
- Adjust completion date if needed to ensure that you are not creating unrealistic goals.
- Assign responsibility for the task.
- Determine any additional resources that can help with this task.
- Notes column is optional. Notes can be recorded on this chart or in project folder.
- Tracking symbols include: ✓ Complete × Delete *IP* In Progress

Project Management Chart

TRACKING	ACTION	DEADLINE	RESPONSIBLE	RESOURCES	NOTES
<i>Symbols:</i> ✓ Complete × Delete <i>IP</i> In Progress	<i>Always starts with a verb.</i>	<i>Must be completed by...</i>	<i>Who will do this?</i>	<i>What is needed? What can help with this task?</i>	<i>What needs to happen first? Other notes.</i>

Training Instrument 14-4. Paperwork Samples

PROBLEM PAPERWORK SAMPLES

How would you organize these items?

1. Notes and hard copies of materials from a monthly department meeting
2. An article on strategic planning (a long-term project) from a trade magazine
3. The first draft of a proposal a colleague left on your desk to review
4. An invitation you received through the mail to a client's open house
5. An unpaid invoice to give to accounting
6. Business expense receipts from attending an out-of-town conference
7. A book on leadership you've been meaning to read
8. A brochure for a seminar that would be good for your team to attend
9. Handouts from a recent training workshop you attended
10. Six sticky notes with reminders on them to call people back

Assessment 14-1. Self-Assessment

1 = Never	2 = Seldom	3 = Sometimes	4 = Often	5 = Most of the Time
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How often do you carry out the behaviors that help you achieve your daily, weekly, and long-term goals? Next to each behavior listed below, circle the number that indicates how frequently you act or respond in these ways.

PLANNING

- | | | | | | |
|---------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. I write out a list of things to do each day. | 1 | 2 | 3 | 4 | 5 |
| 2. At least once a week, I conduct a planning session to schedule and review long-term goals, activities, and priorities. | 1 | 2 | 3 | 4 | 5 |
| 3. I include time in my schedule for unexpected urgencies. | 1 | 2 | 3 | 4 | 5 |
| 4. I schedule buffer time between meetings and appointments. | 1 | 2 | 3 | 4 | 5 |
| 5. I assign priorities to the items on my task list every day. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

TIME USAGE

- | | | | | | |
|----------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 6. I accomplish most of the items on my task list each day. | 1 | 2 | 3 | 4 | 5 |
| 7. I group similar tasks and perform activities in a logical sequence. | 1 | 2 | 3 | 4 | 5 |
| 8. I keep a daily activity log to track my activities, projects, conversations, and interruptions. | 1 | 2 | 3 | 4 | 5 |
| 9. I regularly analyze my time usage to find ways to work more efficiently. | 1 | 2 | 3 | 4 | 5 |
| 10. I do the most important tasks first each day. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

PROJECTS AND TEAMS

- | | | | | | |
|----------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 11. My projects include goal statements and breakdown of activities into specific action items with deadlines. | 1 | 2 | 3 | 4 | 5 |
| 12. My teams achieve their goals by deadline dates. | 1 | 2 | 3 | 4 | 5 |
| 13. I confirm all action items and deadlines before I leave meetings. | 1 | 2 | 3 | 4 | 5 |
| 14. My meetings are well-organized and effective. | 1 | 2 | 3 | 4 | 5 |
| 15. I complete projects on or before deadlines. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

RECORDS MANAGEMENT

- | | | | | | |
|---------------------------------------------------------------------------------------|---|---|---|---|---|
| 16. I can find any file I need in under one minute. | 1 | 2 | 3 | 4 | 5 |
| 17. I use the same organization system for my computer files and my paper files. | 1 | 2 | 3 | 4 | 5 |
| 18. My desk or work area is clear and uncluttered. | 1 | 2 | 3 | 4 | 5 |
| 19. I often analyze my paperwork and look for ways to simplify or improve my systems. | 1 | 2 | 3 | 4 | 5 |
| 20. I regularly sort, review, and clear out paper files. | 1 | 2 | 3 | 4 | 5 |

Total score for this section_____

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Assessment 14-1. Self-Assessment, *continued*

TIME WASTERS

- | | | | | | |
|-------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 21. I handle my most important tasks every day without procrastination. | 1 | 2 | 3 | 4 | 5 |
| 22. I have an effective plan for handling recurring interruptions. | 1 | 2 | 3 | 4 | 5 |
| 23. I stay on task and only deviate for vital interruptions. | 1 | 2 | 3 | 4 | 5 |
| 24. I schedule buffer time into my day to handle those emergencies that arise as part of my job responsibilities. | 1 | 2 | 3 | 4 | 5 |
| 25. I handle the telephone and email efficiently and do not allow them to distract me. | 1 | 2 | 3 | 4 | 5 |

Total score for this section _____

PERSONAL MANAGEMENT

- | | | | | | |
|--------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 26. I have a written set of personal goals. | 1 | 2 | 3 | 4 | 5 |
| 27. I do not feel overly stressed or overworked. | 1 | 2 | 3 | 4 | 5 |
| 28. I feel satisfied that I have accomplished the most important items at the end of my workday. | 1 | 2 | 3 | 4 | 5 |
| 29. I know which values are most important to me and give attention to those areas each week. | 1 | 2 | 3 | 4 | 5 |
| 30. I know how to say no to requests that are counterproductive or will overcommit my time. | 1 | 2 | 3 | 4 | 5 |

Total score for this section _____

Survey TOTAL _____

Review each section to determine the areas in which you would like to make improvements. As you go through today's session, list the ideas you hear that will allow you to be more effective in those areas. List those ideas in the spaces provided.

PLANNING	TIME USAGE
PROJECTS AND TEAMS	RECORDS MANAGEMENT
TIME WASTERS	PERSONAL MANAGEMENT

Assessment 14-2. Program Evaluation

Name (optional):

Course:

Date:

Company:

Instructor:

Time:

Instructions: Answer the questions below. For questions 1 through 10, circle the appropriate number, using the following scale:

1 = Definitely No; 2 = No; 3 = Not Sure/Not Applicable; 4 = Yes; 5 = Definitely Yes

- | | | | | | |
|----------------------------------------------------------------------------------------------------------------|---|---|---|---|---|
| 1. Did you enjoy this workshop? | 1 | 2 | 3 | 4 | 5 |
| 2. Did you obtain the information that you needed? | 1 | 2 | 3 | 4 | 5 |
| 3. Will the handouts be valuable as job aids? | 1 | 2 | 3 | 4 | 5 |
| 4. Do you feel that the information from this workshop will help improve your priority management skills? | 1 | 2 | 3 | 4 | 5 |
| 5. Would you like to attend an advanced course on this topic? | 1 | 2 | 3 | 4 | 5 |
| 6. Did the instructor know the subject matter? | 1 | 2 | 3 | 4 | 5 |
| 7. Was the pacing of the class comfortable for you? | 1 | 2 | 3 | 4 | 5 |
| 8. Were questions answered completely and clearly? | 1 | 2 | 3 | 4 | 5 |
| 9. Did the instructor's presentation style keep your attention and interest in the subject matter? | 1 | 2 | 3 | 4 | 5 |
| 10. Would you recommend this program to others? | 1 | 2 | 3 | 4 | 5 |
| 11. What would you have liked to see more of in this program? | | | | | |
| 12. What would you have liked to see less of in this program? | | | | | |
| 13. What is one thing you learned in this program that you will be able to put into practice in the workplace? | | | | | |