

One of these days I'll get organized!

By Brad Warren, Business Coach and Seminar Leader

How many times have you heard someone say that before? In fact, how many times were you the one saying it, either out loud or to yourself? As someone who teaches time management principles for a living, and who coaches my clients on it as well, getting organized is one of the most frustrating, perplexing, and confusing subjects I can think of. In fact, I would estimate that 80% of my clients spend 80% of their coaching time on this subject alone. So what I will attempt to do in this article is give you some tips, tools, and techniques to help you become a master planner...well, at least a better one, how's that? And as a result of being better at planning and using a planning system, you can increase your productivity and effectiveness and become more efficient at utilizing your time.

First let's talk about the system itself, sometimes referred to as a system for accomplishment or an existence system. By the way, don't confuse activity with accomplishment. What I will be suggesting here is a system for getting things done, not just thinking about getting them done or shuffling them around from day to day. And please note, I don't work for Dayrunner or Franklin Covey or the maker of the Palm Pilot. In fact, I'm not here to promote any particular type of system, just that you have one. I myself started out with More Time back in 1982, then switched to Dayrunner when they went out of business (I guess they had more time and decided to do something else). My wife has been trying to get me to switch over to a Palm, but I'm technologically challenged, so I've stuck with the pen and paper variety. Even though my remarks will mostly be based on my experience with my planning system, you should be able to adapt my comments to your system, whether it's a Palm, Blackberry, another type of PDA, or even a computer program of some type, such as Microsoft Outlook. I'll always try to give you a tip or two on how to adapt.

Every system needs to have a yearly calendar, one that you can look at easily and know if February 2nd of 2005 is a Monday or a Tuesday (actually it's a Wednesday, but who cares? I mean, does anyone really look that far out into the future? Well, to be honest, yes, many people do). In fact, the yearly calendar in my planner goes into 2006, and February 2nd of that year is a Thursday. So that's first.

Next, you need a monthly calendar, one where you can see the entire month at a glance. With Dayrunner, it's a two page month-at-a-glance system. It's not huge, but there's enough space on it for me to schedule my meetings and appointments. And that's all I recommend putting on there (in pencil, by the way, because we all know stuff happens-appointments get changed, etc.). Do not clutter up your monthly calendar with small stuff, such as phone calls, checking email, and taking out the garbage (wait, how did that get in there? Oh, yeah, my wife's been messing with my planner again). By the way, this would be a good time for me to mention that I use my one planner for scheduling both business and personal items. They say a man (excuse me, person) with two watches never knows the correct time. If you have one planner at home, one at work, and carry around a little notepad to record stuff during the day, you'll not only drive yourself nuts trying to remember where you put them, but you'll double book appointments and/or miss appointments because you put it into one planner but not the other. Some of my friends keep a calendar on the refrigerator and record their kids' soccer games or piano lessons on it, only to wind up missing that event because they

didn't transfer that information to their calendar at work. Or they miss an important business meeting or luncheon because they forgot to transfer that to the home calendar. So only have one system (and don't lose it!). I do recommend backing up critical information some place else. If you're using a PDA in conjunction with a computer system, just make sure to sync them up every night.

After the yearly and monthly calendars comes the weekly calendar (I bet you figured that one out on your own). Some systems have a week-at-a-glance page and some don't. It's not critical, and in fact I've done something a little different with this idea. Since my seven daily pages actually function as a week at a glance for me, I've done something else to be able to capture things that I want to have happen during a specific week in the future, but at the time I'm not quite sure exactly which day it will be. So what I've done is taken the cover page for the month, divided it into 4 or 5 sections, depending on whether there are 4 or 5 Mondays in that month (my planning goes from Monday to Sunday, but I'll come back to that later) and labeled each section with Monday's date. For instance, for November of 2005, my cover sheet for the month says 11/1, 11/8, 11/15, 11/22, and 11/29. Now if something crops up today and I know I want to do it during the week of November 22nd but I'm not exactly sure which day that week I will do it, I'll just capture the thought on the cover page, and when it comes time to plan out that week in more detail (again, more on that later) I'll check the cover page for that week and then move those items to my daily to-do list for whichever day is appropriate. This will become more clear when I talk about planning a week at a time, but for now just create a system for yourself to capture tasks that will take place in the future during a specific week. For PDAs and Outlook, I think you can just go right to that week and enter in the data, and it will hold it for you until you get to scheduling that week in more detail. That's one of the advantages of the electronic versions over the pen and paper types.

OK, so now we've got yearly, monthly, and weekly, so of course what's next? No, not a nap, for crying out loud! Come on, you sales and marketing people, get with the program. Yes, daily planning pages. One page per day, 365 of them suckers. Now I don't recommend carrying around with you all 365 pages. In fact, I only put this week's seven daily pages and next week's seven daily pages into my planner, and leave the rest on my desk at home. If I'm at home when someone calls, and they say "Hey, Brad, can you call me on December 23rd to remind me about such-and-so?" I'll say "Hey, what am I, your secretary?" No, no, I wouldn't say that, especially if they're a paying client. What I'd say is, "Hold on, let me put that on my daily to-do page for that date" and I'd reach down and pull out the daily page for December 23rd and I'd write the task down right then and there. If I'm not at my desk and I get the request from someone at a meeting, for instance, I'd turn to the monthly cover sheet for December (yes, I do carry the monthly cover sheets for 2004 and all of 2005 with me), find the proper week for December 23rd (which happens to be the week of 12/20) and I'd write in that section, "Call Mr. Lazy Butt on 12/23 to remind him of such-and-so." Then when I get to planning the week of 12/20, I'll see the notation and transfer it to the daily page of 12/23. Are you still with me? I hope so.

After yearly, monthly, weekly, and daily come some other sections that you, personally, might find useful, such as your goals, particular projects you're working on, a section for expenses and travel and credit card purchases, phone and mileage logs, etc. I even have a section on books that includes what I've read and books I'm going to read

(some day, when I have the time). Then a notes section so you'll always have blank pages to doodle on, I mean, take important notes on, during those wonderful sales and marketing meetings you go to. Finally, a telephone and address section to keep all of your clients, family, and friends' (uh, you do have friends, don't you?) information handy so you can reach them if needs be. Again, back up this section somewhere safe. The worst thing that can happen is having to send out that dreaded email (if you still have that information) saying "Hi! Could you please send my your contact information again because by Palm crashed and I lost my entire address book?" If you have a paper planner like me, you can add a small, zippered pouch in the back for carrying an extra pen, pencil, spare change, stamps, aspirin, thin calculator, etc. That tip is mostly for the guys, since I'm assuming most women would carry that kind of stuff in their purse...unless you're a guy with a purse, in which case...oh, enough with the politically correct stuff. I just can't help myself being from California. My apologies.

A couple of additional tips: when you think it, ink it. As soon as you have a thought, especially a good thought, ink it somewhere in your planner (Stay calm, put it in the Palm. I haven't yet been able to come up with the equivalent jingle for Outlook). How many times have we had a great idea, only to lose it because we didn't write it down? If the thought comes up to call your Mom whom you haven't spoken to in weeks (years?) write it down immediately into the planner or you'll forget. Likewise, make your planner a constant companion. Take it everywhere, to meetings, to appointments, etc. The worst thing I've seen is smart business people going to a business meeting and having to get up to leave the room with the rather feeble excuse of "Oh, I'm sorry, I left my calendar on my desk. I'll be right back." Have it with you all the time. If you're using Outlook or some other computer planning system, just print out that day's or week's agenda and carry that to take notes on. Then when you're back at your computer, enter in all the new dates and promises you made it the meeting. But the most important tip I can think of is have a planning system that works for you! Don't buy a fancy Palm with all the bells and whistles or a Franklin Covey Planner if you're not going to use it. Buy one that you'll use, or create one for yourself.

OK, now you've got your system, so how do you use it to maximize effectiveness? Here's how I use mine: every Sunday for the last 22 years, I've blocked out 30-45 minutes for planning the upcoming week. I first spread out in front of me the seven daily pages for that week. I then go to my monthly calendar, and transfer all of the set appointments and meetings that are already scheduled. Those I refer to as my rocks, my boulders, big things that are set in place and can't be moved (unless a client calls and says "I can't make it to the meeting, let's reschedule."). Next I look at the cover page for that month, locate the appropriate week, and move all of the accumulated items for that week to an appropriate day. These are pebbles, smaller than the rocks and more movable and flexible. From our previous example, if it were the week of December 20th, now is when I'd take that phone call to Mr. Lazy Butt, move it to December 23rd, and place it on that daily page in a time slot in between the boulders of that day. After I'd scheduled all the pebbles from the weekly page, I'd plan out all the sand- the seemingly hundreds of smaller items, such as opening the mail, returning phone calls from the previous week, taking out the garbage (Dang! There goes the wife again, adding things to my to-do list!), checking emails, paying bills, etc. I might even schedule in some more rocks, such as blocking out an hour or two to do some writing (much like I had to do for this article)

or some more pebbles, like 15 minutes to read one chapter in a book, or 30 minutes to practice my script for the next sales call. By the end of that planning time on Sunday, I've now got my entire week scheduled out, including time to be spontaneous (Ha! Ha! Gotcha, didn't I?). I've actually discovered that by planning out my week in advance, I am able to be more spontaneous because I know I'll get things done in due time. You might even consider blocking some time for nothing, so that when an emergency arises in the middle of a major rock, you've got an hour squirreled away with nothing scheduled, so you can deal with the emergency right then and complete that interrupted project later in the unscheduled time.

Well, that's it. I hope you have found this valuable, or at least entertaining. Let me close with a few of my favorite quotes about time. This one from Benjamin Franklin: If we take care of the minutes, the years will take care of themselves. And from E.B. White: I awake each morning torn between a desire to save the world and a desire to savor the world. This makes it hard to plan my day. Good luck!

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