

A Time Management Checklist

Here are 50 time-tested ways of improving your personal productivity extracted from Harold Taylor's books and training programs. Check off those ideas that make sense to you, and yet are not currently being practiced.

- 1. Put your personal and organizational goals in writing.
- 2. Every week do something that brings you closer to your annual goals.
- 3. Schedule *appointments with yourself* to complete priority work.
- 4. Schedule more time for tasks than you think it will take.
- 5. Set priorities according to importance, not urgency.
- 6. Make notes while you are talking on the telephone.
- 7. Use a *Delegation Record* or *Assignment Record* to keep track of assignments to others.
- 8. Develop the *do it now* habit. Don't procrastinate.
- 9. Have meetings start on time, end on time and have a timed agenda.
- 10. Take advantage of commute time, travel time and waiting time to get things done.
- 11. Toss out as much correspondence and paperwork as possible.
- 12. Don't write when a telephone call will do.
- 13. Make minor decisions quickly.
- 14. Set deadlines on all tasks you delegate.
- 15. Be time conscious rather than a perfectionist. Let the amount of time spent on a task be proportionate to the value of the outcome.
- 16. Hold meetings only when absolutely necessary, and *keep them brief*.
- 17. Keep telephone conversations brief; discuss the business up front.
- 18. Write brief letters, reports and e-mail. Encourage brevity in others.
- 19. When a crisis occurs, immediately determine how to stop a recurrence.

- ___ 20. Say “no” more often. Have as much respect for your own time as you have for other people’s time.
- ___ 21. Don’t keep shuffling papers; handle each item only once whenever possible. Do it, scrap it, file it, delegate it or schedule a time to do it later.
- ___ 22. Use a follow-up file to hold paperwork relating to scheduled tasks.
- ___ 23. Use a *Participant’s Action Sheet* at meetings to record notes.
- ___ 24. Take advantage of timesaving technology such as handheld computers, business card scanners, remote access software and *Paper Tiger* software.
- ___ 25. Don’t allow upward delegation. Ask for solutions, not problems.
- ___ 26. Start earlier in the morning. Utilize your *prime time* for priorities.
- ___ 27. Don’t keep magazines. Tear out or photocopy relevant articles.
- ___ 28. Plan as far in advance as feasible.
- ___ 29. Record the whole year’s schedule of meetings, events etc. into your planner.
- ___ 30. Always carry a small scratch pad, pocket recorder or handheld computer to record notes and capture ideas.
- ___ 31. Use the same planner for home and office. Schedule time for family events as well as work.
- ___ 32. Be in control of your own life; don’t let others’ lack of planning become your crisis.
- ___ 33. Have set times each day to review your e-mail. Assign a time limit.
- ___ 34. Always take a few minutes after each meeting to evaluate how it went.
- ___ 35. If someone calls for an appointment, try to settle the matter right then on the telephone.
- ___ 36. When leaving a message for someone to call you back, indicate a convenient time to call.
- ___ 37. If the person you’re calling is not in, try to get the information you need from someone else.
- ___ 38. Record the time you must leave the office when traveling to a distant meeting.

- ___ 39. If items dropped in your in-basket distract you, move the basket from your desk.
- ___ 40. When away on a business trip, have someone else sort and dispense with most of your mail.
- ___ 41. To reduce interruptions during the day, hold brief stand-up meetings with your staff each morning.
- ___ 42. When filing paperwork, record a *throw out* date on it to make subsequent purging easier.
- ___ 43. Schedule specific amounts of time to review and dispense with your mail and voice mail.
- ___ 44. Hold brief breakfast meetings when most people are mentally alert and have a full day to take action.
- ___ 45. Capture ideas when listening to cassette tapes or CDs by dictating into a pocket recorder.
- ___ 46. Use checklists for recurring events such as meetings, sales calls, and business trips.
- ___ 47. Spend time each week on *time investments* – those activities that will help you free up more time.
- ___ 48. When putting something in your follow-up file, make a corresponding note in your planner that tells you it's there.
- ___ 49. Recognize you can't do everything. Work on the 20% of the activities that produce 80% of your results.
- ___ 50. Manage stress by putting life in perspective, and not taking yourself too seriously.
- ___ Total ideas checked

Action Sheet

In order to get started, choose three ideas that make sense to you, and that you would be willing to start practicing. Record them on the following *Action Sheet*, select a starting date, and go to it! Remember to persist for 4 weeks to allow time for a habit to develop in the event that the ideas are *behavioral* in nature. Once they are working successfully, choose three more and work on those.

Three of the most useful ideas:

1.

2.

3.

How to implement the ideas

The ideas listed on the Time Management Checklist are either *mechanical ideas* or *behavioral ideas*. Mechanical ideas are those that can be put into practice immediately without the necessity of a behavioral change. In other words, you don't have to form a new habit in order to make them work for you. For example, changing the location of your telephone from your desk to the credenza behind you is a mechanical idea. When the phone rings you have to turn around to pick it up, which means you'll be facing the wall, with your back to the doorway. Since you will avoid eye contact, most people won't try to talk to you while you're on the phone. This idea will work immediately, since you don't have to form the habit of turning around — you *have* to turn around in order to pick up the phone.

Behavioral ideas are those that require a behavioral change in order to make them work. You have to form a new habit. This could take weeks of persistence. For example, if you are currently in the habit of talking on the phone without making notes, a behavioral idea that could save time would be to start recording all calls in a systematic way. This ensures that nothing is forgotten, reduces follow-up calls, and increases concentration and so on. But you have to form the new habit before you can reap the rewards of the idea.

Mechanical ideas are plentiful, and since they require no behavior change, any number of them could be put into practice simultaneously. Although the time saved by each idea may be minimal, collectively they add up to hours. Behavioral ideas, on the other hand, would be overwhelming if you introduced more than one or two at a time. They take several weeks before they become habitual. But the payback, in terms of time saved, is usually much greater than the same number of mechanical ideas.

Since small successes are motivational I suggest you start with a series of mechanical ideas. Clean up your work area, get rid of superfluous material, move your in basket off your desk, make up a follow-up file, arrange your materials so they're close at hand. Then choose a behavioral idea that would eliminate a time waster that you're experiencing. For example, if papers tend to accumulate on your desk and you waste time shuffling papers, build the habit of scheduling paperwork in the follow-up file for later action. If you are forever interrupting yourself and others as questions pop into your mind, start using a *Delegation Record* or *Communications Record* to accumulate those questions. If you're putting off important tasks because you don't have time, break the tasks into smaller chunks and schedule them in your planner to work on at specific times. Each time a behavioral idea has been fully mastered, pick another one and work on it until it, too, has been incorporated into your daily routine.

Making time work for you

Once you are successful in implementing a dozen or more of the ideas introduced at this time management session, you will have freed up some time. Use this time to work on some of the time investments explained earlier. For example, train someone else to take over one of your tasks, learn a new timesaving software program or spend an hour every Friday afternoon planning the next week. Continually re-investing the additional time that you have freed up will result in increased effectiveness in turn. This process is referred to as making time work for you.

Implement a new idea each week

It's important to continue to implement timesaving techniques in the weeks and years ahead. You might want to subscribe to *Taylor's Time Tips*, a free, weekly electronic newsletter that offers about five different ideas every Monday. If you apply only one idea each week, your personal productivity will increase immensely during the course of a year. *Taylor's Time Tips* is in its fifth year of publication. Subscribe at our home page at www.taylorintime.com.

Making Time Work For You

Harold Taylor periodically conducts a distance education program on effective time management through a password protected website, e-mails and conference calls. For detailed information or to register, visit http://www.taylorintime.com/viewproduct.php?products_id=19.