

Time Management Agenda

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- Introductions/sharing
 - ➔ Everyone share biggest time sucker
 - ➔ Everyone bring one tip for time management
- 4 D's of Time Management (Jenn)
 - ➔ Overview & Examples
 - ➔ Share Blank Templates
- Time Study/Tracking (Jenn)
 - ➔ Importance
 - ➔ Review Sample Tracking Sheet

Time Management Tips for the Office: Jenn

- **Environment**
 - -At the end of each day take a few minutes to tidy your workspace so that you can jump right into productive work in the morning. Being organized saves time spent looking for needed documents, items, etc. As boring as it might sound, cleaning up your workspace simultaneously clears your mind and gives you a calming feeling of accomplishment. This includes organizing your digital space as well. When it comes to organizing your emails, use folders or labels to group related information together which will result in easier recall in the future.
 - Guard your time! When you're focused on an important task and someone comes by your workspace to meet with you, ask to schedule a time to meet after you've completed your task. Stopping and starting a task takes longer than completing the task from start to finish. Enter the task you are working on into your calendar so that coworkers can see you are busy and have dedicated that time to something.
 - Schedule your breaks! Breaks are essential for helping us focus. Some people's brain functions best when toggling between moments of intense focus and unfocus. By adding breaks into your schedule, you can be sure you're disengaging at optimal times. Use your breaks to get a drink, grab a snack, chat with a coworker, or go work a walk. Your brain will be grateful for the break.
 - Be aware of your peak performance time(s). Schedule the most difficult or unpleasant tasks during the times you are most productive.
- **Prioritize**
 - Writing out a to do list is one thing. But you also have to know how to prioritize those tasks. Utilizing the 4 D's of Time Management can assist you with knowing which tasks to complete first and which tasks you can throw out so that you are spending your time

on the most productive and valuable tasks each day. If you do not like the 4 D's of Time Management try the 80/20 method.

- **Keep a List of Back Up Tasks**

- When you're in your flow, there's nothing that can ruin your mood quite like waiting. Maybe you're waiting to hear back from a team member, employer, supervisor, etc or you are in your car with 15 minutes before your next appointment. Whatever you're waiting on, use those moments to take care of small tasks. Catch up on missed calls or respond to emails. Voice record some notes into an email to case note later.

- **Track Your Time**

- Tracking time is the best way to master time management. Estimate how long it will take you to complete a task. Then monitor the time you spend on that task and compare it to your estimated time. Monitoring your time can help you be more conscious of the flow during the workday and result in more realistic scheduling to avoid over or under scheduling yourself. Tracking your time can also help you be more productive as you will visibly be able to see what tasks you spent your time on and which tasks offer the most return on your investment of time.
- Auditing your time every week will assist you with improving your time management skills. You will be able to see where you spent most of your time and how valuable those tasks were. This will also allow you to see how much of your time is productive time and perhaps what tasks you can delegate or delete.

- **Minimize Distractions**

- Distractions are the enemy of anyone trying to manage their time, identifying your specific distractions is key to success time management.
- Turn off email notifications! Instead of answering every email immediately, dedicated a portion of your day to answering them all at once. Find a time that works best in your schedule and add email checking to your calendar. If an urgent matter arises whoever is trying to contact you will call or stop in your office rather than just sending an email.
- Put phone on Do Not Disturb
- Turn cell phone upside down so you cannot see notifications coming in
- Close your office door to signal your coworkers you are not available.

- **Planning, Including Planning for the Unplanned**

- Divide your time among your daily tasks with some added buffer time. Over scheduling yourself will only end in stress, incomplete work and poor quality. Scheduling most of your day allows for structure and a guide for how to spend your time. Including an added buffer will allow for surprise meetings, emergencies, etc without throwing your entire day off or unneeded stress.

- **Multitasking Sabotages**

- We tend to look at multitasking as a strength however it can also be self sabotage when trying to be productive and focused. According to recent research on time management skills, divided focus reduces productivity drastically and can be a drain on your brain. Instead of getting more done at once, multitasking can have the opposite affect. Multitaskers are more prone to error, take more time to complete projects, and focus less. We tend to be more productive if we work on the first task until it's completes and

then move onto a second task rather than switching back and forth between two tasks as this disorients the brain.

- **Worry When it's Time to Worry**

- Do not worry about task B when you're working on task A. Worry about an unrelated task takes your focus away from the task at hand causing it to take longer to complete.

- **Session it Up**

- Break up your work time into sessions and remember to take a break after each session to refresh your mind and keep you focused and relaxed while working. And also, if any not-so-important activity tries to intrude, you can just push it to your next break. This way, your work sessions offer you effective time versus wasted time.

- **Automate Your Work**

- Stop spending precious time on tasks that can be automated. Rather than type in 20 email addresses to send out a publication create an emailing list that you can use each month.

- **Case Noting**

- Without a case note, your agency is not getting paid. This task is equally as important as seeing consumers and employers. If you don't have time to case note you probably shouldn't be seeing clients or employers. Allow yourself permission to cancel a meeting and reschedule if you are not caught up on case noting. Consumers and employers request to reschedule meetings all the time; it is okay for you to do the same. Of course you can avoid this altogether if you schedule time each day for case noting. You will spend less time entering each note if you do so the same day while the information is fresh in your mind. Think of case noting like a homework assignment. You meet with a client but then do not do the case note. This is like completing the homework but never turning it in.

- **Deadlines**

- Know your deadlines and be realistic when scheduling tasks to allow buffer time for incidentals beyond your control. Do not schedule a task the day before it is due! Being able to complete work before a deadline will allow you to feel more efficient and produce a higher level of quality versus rushing to get it completed because the deadline is looming.
- Be mindful of routine tasks and how long they generally take you to complete. Knowing the length of time a task takes to complete will help you to more realistically schedule your day.

- **Apps and Tools**

- Besides tracking your time with a time tracking solution, time management apps may help you to monitor or organize your to-do list. Apps like Freedom can help you block sites that might distract you. Meanwhile, project management tools like Asana, Airtable and Trello can help you organize and visualize your work. You can even sync some apps with your own time tracking solution to improve task visibility and track time on projects.

- **Utilize Meeting Agendas**
 - Have you ever heard someone say the information shared in a meeting could have just been done via email; don't be that meeting facilitator! Everyone's plate is overflowing and time is more precious than ever. To ensure participants time is being utilized and that meetings are productive and valuable to those attending make sure you create an agenda. Agendas allow attendees to understand how the time will be spent and whether the meeting applies to them. On the opposite side of that, as a meeting participant be sure to review the agenda ahead of time and decide whether this meeting will be a good use of your time. Meetings with agenda's typically end early as they are well structured; everyone will appreciate having time back into their schedules.

- **Quit Procrastinating**
 - We all have tasks on our to do list that we do not want to complete. Sometimes we are waiting for inspiration to start working on such tasks. Working when you're not inspired or motivated can be hard. However, inspiration can only come with action. And if you're not inspired or motivated, sometimes, you need to start doing the work. Start now, inspiration and motivation will follow.

- **Learn to Say No**
 - Learning to say no can help you avoid an overwhelming workload or last-minute requests. It puts you in charge of your workload and helps you set boundaries with others. Without these boundaries, you may be more prone to burnout and poor time management.

Time Management in Community Tips: Sierra

- You can apply a lot of the same tips from the office time management portion to in the community. Here's some other ones that are a little bit more specific to being in the community:
 1. Scheduling:
 - Schedule everything in advance so all you have to do is follow your calendar. Adjust your calendar in real time as your day progresses.
 - If you can estimate ahead of time your billable units each day, then you only have to keep track of the miscellaneous things that pop up or change throughout the day.
 - Know your preferences and be nice to yourself. Don't schedule a challenging consumer for right away in the day... that will likely make you more fatigued for the rest of the day. If you know you are more upbeat during a certain time of day, maybe schedule yourself to do job development during those times instead of administrative stuff (or vice versa).
 - If you like an easy Monday, schedule yourself for tasks you like, or tasks that aren't super challenging. You can work for yourself and schedule based off of when you're most productive/ in the mood to do certain tasks.
 - If you really need to, you can cancel on an appointment with a consumer or employer. Just make sure you try to reschedule right away. There are times where

it's best to push through being in bad mood or not feeling well, but sometimes you need to prioritize yourself and understand that it's best to cancel.

- Ask yourself: "Will rescheduling this appointment be detrimental to the consumer?" If not, then you can reschedule it.
 - Similarly, it's okay to say no. We get asked to attend a lot of meetings or doing a lot of things of consumers at the spur of the moment. It's okay to say no. You don't have to explain why.
 - Schedule appointments for times that work for YOU.
 - Geographic scheduling:
 - Travel time IS productive time but be smart with it. If your issue is not having enough time to get things done in the day, then schedule appointments closer together geographically.
 - If your issue is not having enough billable time in a day, then you can afford to travel farther away.
2. Appointments:
- Confirm the appointment, especially in the time of COVID.
 - I like to confirm a few hours ahead of time. Communicate that you will confirm a few hours before the appointment so that the person knows to keep an eye out for your call/text. Communicate your expectations: "If I don't hear back from you then I will assume we cannot meet." (some exceptions to this based on the consumer.)
 - Consumer job starts/ urgent meetings:
 - Say a consumer has been offered a job and the employer wants the consumer to start right away. It's worth exploring/discussing if that makes sense for everyone's schedule. If the consumer needs your support on the job, take your schedule into consideration too. This can be used as an opportunity to model to the consumer that you are prioritizing yourself and their needs to ensure you can provide the best service.
 - Misc appointments (treatment team, supervisor, etc.)
 - NOT EVERYTHING IS IMPORTANT. Communicate with your supervisor. Can you shift the deadline?
3. Cancellations/waiting/break in between appointments:
- Keep a list of tasks that you can do during these instances.
 - Not a lot of time to kill:
 - Calling someone back
 - Replying to emails
 - Small case notes / few amount of case notes.
 - Jotting down details about a case note
 - Organizing your mileage (start time, end time, miles)
 - Planning for the next day's appointments
 - Lots of time to kill:
 - Job Development

- Bigger case notes / many case notes.
- Calling other consumers to see if they can meet
- Go back to the office to work on a project

4. Miscellaneous Tips:

- Analyze – what is the actual problem? Is this really a time management issue? KNOW your problem (it might not be a time management issue, it might be a process issue).
 - “I’m always running late to my appointments.”
 - Why?
 - Because my previous appointments usually lasts longer than I anticipate
 - Ok, so schedule your appointments for longer in your calendar so you can adjust the rest of your appointments accordingly.
- Paradigm shift: Time management as self-care. The better you can manage your time that works for YOU, the better you will feel after work.
- De-mystifying time management: It might not be that you’re not good at managing your time. Maybe it’s that you’re not good at prioritizing yourself. Ask yourself: What will make me feel relieved to finish and get done with? Do that first.

- Q&A—

- Sierra & Jenn ask: How can your supervisor help support you with improving time management? What do you need from your supervisor/agency to help you with time management?