

Time Management

Corporate Training Materials



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Module One: Getting Started

Time management training most often begins with setting goals. This process results in a plan with a task list or calendar of activities.

This entire process is supported by a skill set that should include personal motivation, delegation skills, organization tools, and crisis management.

Cherish your dreams, as they are the children of your soul, the blueprints of your ultimate achievements.

Workshop Objectives

- Overcome procrastination
- Organize your workspace
- Delegate more efficiently
- Plan and prioritize



Module Two: Setting SMART Goals

Goal setting can be used in every area of your life. Setting goals puts you ahead of the pack! Some people blame everything that goes wrong in their life on something or someone else.

Successful people dedicate themselves towards taking responsibility for their lives, no matter what the unforeseen or uncontrollable events.

The bad news is that time flies. The good news is that you are the pilot.

The Three P's

- Positive
- Personal
- Possible

P

The SMART Way

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant
- **T**imed

Prioritizing Your Goals

- Invest your mental focus on one goal
- Choose a goal that will have the greatest impact



Visualization

Visualization

- Emotionalizing
- Vision board
- List of the benefits



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Module Two: Review Questions

1. Which is not one of the Three Ps of goal setting?
 - a) People
 - b) Positive
 - c) Personal
 - d) Possible
2. In the SMART acronym what does the T stand for?
 - a) Timed
 - b) Tedious
 - c) Two
 - d) Together

Module Two: Review Questions

3. When prioritizing your goals it is better to focus on several goals at once.
- a) True
 - b) False
4. In order for visualization to work, it's necessary that you _____ your goal as much as possible.
- a) Share
 - b) Populate
 - c) Emotionalize
 - d) Achieve

Module Two: Review Questions

- 5) In which area of your life can goal setting be used?
- a) Financial
 - b) Physical
 - c) Spiritual
 - d) All of the above
- 6) Which of these is something that your goals should reflect?
- a) The dreams and values of the media
 - b) The dreams and values of your friends
 - c) Your dreams and values
 - d) All of the above

Module Two: Review Questions

- 7) Which of these is crucial for goal achievement?
- a) Creating vague goals
 - b) Track your progress towards your goal
 - c) Setting unrealistic goals
 - d) Creating a goal that does not have a deadline
- 8) When prioritizing, which goal should you choose?
- a) Choose a goal that identifies only what you want
 - b) Choose a goal based on how long it will take to achieve it.
 - c) Choose a goal that will have the greatest impact on your life
 - d) Spread yourself thin by focusing on several goals at once

Module Two: Review Questions

9) What is one of the best visualization tools?

- a) A bar graph
- b) A PowerPoint presentation
- c) A vision board
- d) A list of goals

10) What will help you materialize your goal into your life?

- a) Visualizing and acting quickly
- b) Visualizing and emotionalizing
- c) Emotionalizing and relaxing
- d) Emotionalizing and acting quickly

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Module Three:

Prioritizing Your Time

Time management is about more than just managing our time; it is about managing ourselves in relation to time.

It means being willing to experiment with different methods and ideas to enable you to find the best way to make maximum use of time.

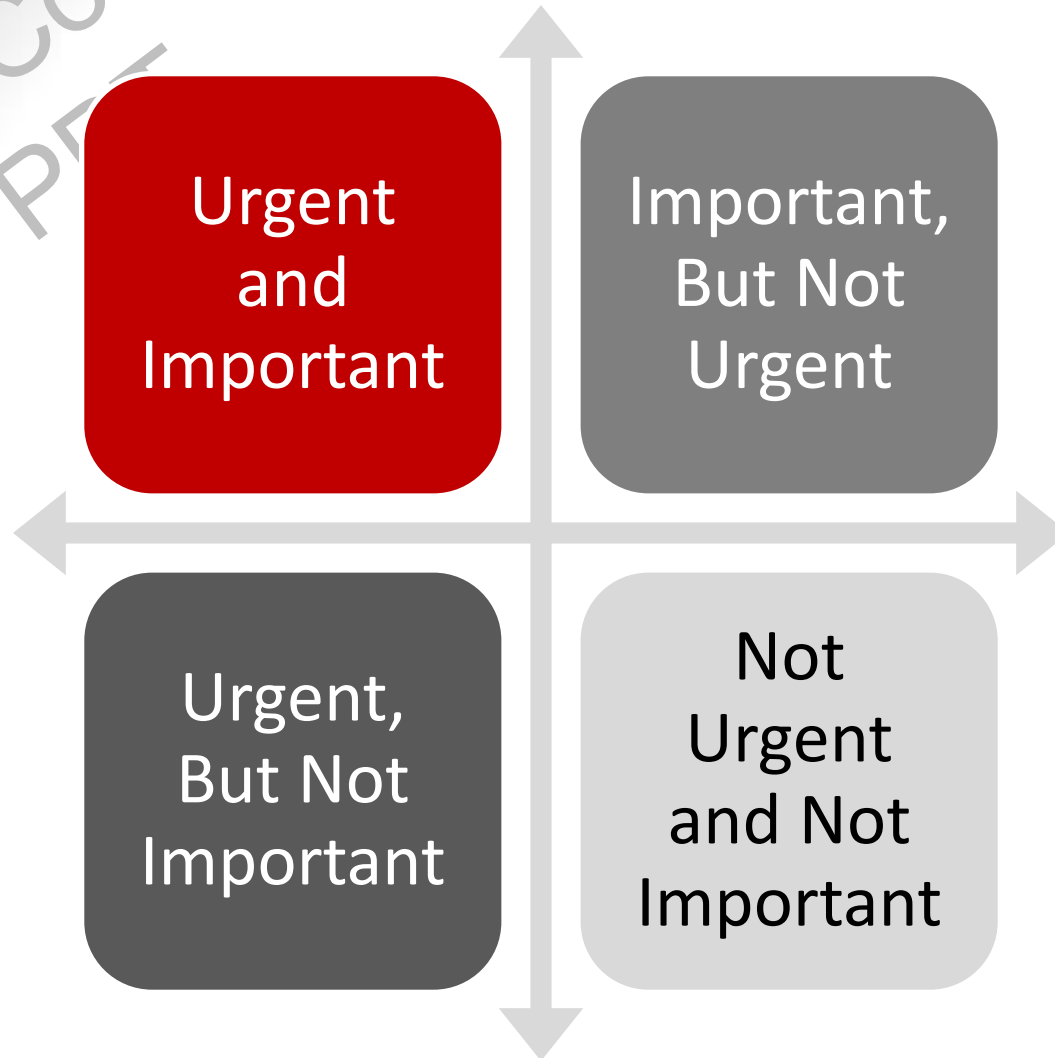
What is important is seldom urgent and what is urgent is seldom important.

The 80/20 Rule

80% - - - > Results

20% - - - > Actions

The Urgent/Important Matrix



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Being Assertive

- Honest explanation
- Clarify your reasoning
- Give an alternative
- Assertive refusal



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Module Three: Review Questions

1. The 80/20 rule states that 80% of your _____ come from only 20% of your _____.
 - a) Errors / mistakes
 - b) Results / actions
 - c) Time / actions
 - d) Results / friends
2. A deadline to complete a report due next month can be considered Urgent and Important on the Urgent/Important matrix?
 - a) True
 - b) False

Module Three: Review Questions

3. Where would having lunch with a coworker fall on the Urgent/Important matrix?
 - a) Urgent and Important
 - b) Important, But Not Urgent
 - c) Urgent, But Not Important
 - d) Not Urgent and Not Important

4. A great tool in being more assertive is to use a _____no when interrupted.
 - a) Positive
 - b) Negative
 - c) Manual
 - d) Timely

Module Three: Review Questions

- 5) Which of these is the best description of what time management is about?
- a) Managing ourselves in relation to time
 - b) Managing our time
 - c) Continuing habits and activities that waste our time
 - d) Keeping your strategies that help you manage time the same
- 6) What is the 80/20 rule also known as?
- a) Business logic
 - b) Z notation
 - c) Pareto's principle
 - d) Urgent/Important matrix

Module Three: Review Questions

- 7) What activities demand immediate attention, but are often associated with someone else's goals rather than our own?
- a) Urgent
 - b) Important
 - c) Not urgent
 - d) Not important
- 8) What is a powerful way of organizing tasks based on priorities?
- a) Business logic
 - b) Z notation
 - c) Pareto's principle
 - d) Urgent/Important matrix

Module Three: Review Questions

- 9) Which of these is not an example of a Positive No?
- a) “I am uncomfortable doing that because...”
 - b) “I don’t have time to do that today, but I can schedule it today.”
 - c) “I can’t right now because I have another project that is due by 5 pm today.”
 - d) “I understand that you need to have this paperwork filed immediately, but I cannot file it for you.”
- 10) What is the positive no most appropriate for?
- a) Aggressive people
 - b) Manipulative people
 - c) An effective strategy to control your emotions
 - d) All of the above

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Module Four: Planning Wisely

The hallmark of successful time management is being consistently productive each day.

Having a daily plan and committing to it can help you stay focused on the priorities of that particular day.

A work well begun is half ended.

Creating Your Productivity Journal

- Notebook
- Prioritize tasks
- Cross off completed items
- Carry over unfinished tasks



Maximizing the Power of Your Personal Productivity Journal

- Plan the night before
- Keep your journal with you
- Sense of satisfaction
- Remove tasks postponed three times



The Glass Jar: Rocks, Pebbles, Sand, and Water

- Rocks
- Pebbles
- Sand
- Water



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Chunk, Block, and Tackle

Break down the project into manageable **chunks**

Block off time to work on the project

Then **tackle** it with a single - minded focus



Ready, Fire, Aim!

- Do not over plan
- Just take action
- Adjust your aim



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Module Four: Review Questions

1. It is recommended to keep a separate journal for work and for your personal life.
 - a) True
 - b) False
2. If you postpone a task _____ times, it does not belong on your action list.
 - a) 3
 - b) 4
 - c) 5
 - d) 6

Module Four: Review Questions

3. What is considered trivial time-wasters are neither important nor urgent in the Glass Jar approach?
- a) Rocks
 - b) Pebbles
 - c) Sand
 - d) Water
4. A large project can be broken down by Chunk, Block , and _____
- a) Completed
 - b) Tackle
 - c) Fire
 - d) Focus

Module Four: Review Questions

5. Often in time management planning, it is better to think _____, _____, _____
- a) Ready, Fire, Aim
 - b) Ready, Aim, Fire
 - c) Aim, Aim, Fire
 - d) Fire, Ready, Aim
- 6) What is the hallmark of successful time management?
- a) Accomplishing everything you planned to every single day with no excuses
 - b) Being consistently productive each day
 - c) Putting off things that are due the next day
 - d) Taking time out for distractions during your day

Module Four: Review Questions

- 7) Which of these is not a step in creating a Professional Productivity Journal?
- a) Highlight the top five items and focus on those first
 - b) Get yourself a spiral notebook and label it as your Professional Productivity Journal
 - c) Label each page with the day and the date and what needs to be done that particular day
 - d) Prioritize each task in order of importance
- 8) Which personal development expert believes that when you write down your action list the night before, your subconscious mind focuses on that plan while you sleep?
- a) Britt Reints
 - b) Stephen Guise
 - c) Jamie Alexander
 - d) Brian Tracy

Module Four: Review Questions

- 9) What does “sand” represent in the Glass Jar approach?
- a) Your highest priority projects and deadlines with the greatest value
 - b) Urgent, and important tasks, but contribute less to important goals
 - c) Urgent, but not important tasks
 - d) Neither important nor urgent tasks
- 10) Which time management strategy is ideal for taking on jobs that are so overwhelming it is difficult to even plan to start them?
- a) Chunk, block, tackle
 - b) The Glass Jar approach
 - c) Ready, Aim, Fire
 - d) Chunk, block, focus

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Module Five:

Tackling Procrastination

Procrastination means delaying a task (or even several tasks) that should be a priority.

The ability to overcome procrastination and tackle the important tasks is a hallmark of the most successful people out there.

I am a great believer in luck, and I find the harder I work, the more I have of it.

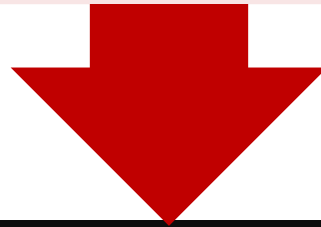
Thomas Jefferson

Why We Procrastinate

No clear deadline

Inadequate resources

Where to begin?



Feel overwhelmed

Lack of passion

Fear of failure

Nine Ways to Overcome Procrastination

- Delete
- Delegate
- Do it
- Ask for advice
- Chop it up
- 15 minute rule
- Clear deadline
- Reward
- Remove distractions



Eat That Frog!

Your frog is the task that will have the greatest impact on achieving your goals, and the task that you are most likely to procrastinate starting.



Module Five: Review Questions

1. Which item is a reason we generally procrastinate?
 - a) Don't know where to begin
 - b) Task feels overwhelming
 - c) No clear deadline
 - d) All of the above

2. What habit will help you overcome procrastination?
 - a) Have a clear deadline
 - b) Delay the task
 - c) Make more plans
 - d) All of the above

Module Five: Review Questions

3. In the “Eat That Frog” analogy what does the frog represent?
 - a) Procrastination
 - b) A task that will have great impact
 - c) Ideas
 - d) A task that will have low impact

- 4) What is the definition of procrastination?
 - a) Tackling the important actions that have the biggest positive impact in your life
 - b) Delaying a task (or even several tasks) that should be a priority
 - c) The latest time or date by which something should be completed
 - d) To bury or drown beneath a huge mass

Module Five: Review Questions

- 5) Which of these is not a reason for procrastination?
- a) Passion for doing the work
 - b) Inadequate resources available
 - c) Fear of failure or success
 - d) Task feels overwhelming
- 6) Which way to overcome procrastination can be defined as “help from a trusted mentor, supervisor, coach, or expert can give you some great insight on where to start and the steps for completing a project”?
- a) Delegate
 - b) Delete it
 - c) Do it now
 - d) Ask for advice

Module Five: Review Questions

- 7) Who gives the advice “Break it down into the ridiculous.”?
- a) Britt Reints
 - b) Stephen Guise
 - c) Jamie Alexander
 - d) Bob Proctor
- 8) To reduce the temptation of procrastination, each actionable step on a project should take no more than how many minutes to complete?
- a) 5
 - b) 10
 - c) 15
 - d) 20

Module Five: Review Questions

- 9) What does the saying "If you have to eat two frogs, eat the ugliest one first!" mean?
- a) If you have two important tasks before you, start with the biggest, hardest, and most important task first
 - b) The key to reaching high levels of performance and productivity is for you to develop the lifelong habit of tackling your major task first thing each morning
 - c) Celebrate the completion of project milestones and reward yourself for getting projects done on time
 - d) You need to establish a positive working environment that is conducive to getting your work done
- 10) What do many employees confuse activity with that causes failure to execute?
- a) Procrastination
 - b) Accomplishment
 - c) Time management
 - d) Celebration

Module Five: Review Questions

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Module Six: Crisis Management

With better planning, improved efficiency, and increased productivity, the number of crises you encounter should decline.

However, you can't plan for everything, so in this module we'll look at what to do when a crisis does occur.

In a crisis, be aware of the danger, but recognize the opportunity.

When the Storm Hits

- What happened?
- What were the causes?
- What will happen next?
- What events will this impact?
- Who else needs to know about this?



Creating a Plan

- Identify the problem
- Decide on a solution
- Break it down into parts
- Create a timeline



Executing the Plan

- Continue evaluating the plan working
- Stay organized and on top of events
- Deliver communication to others



Lessons Learned

- Why it happened
- Learn from the event
- Prepare



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Module Six: Review Questions

1. When a crisis hits you should implement the first fix that comes to your mind.
 - a) True
 - b) False
2. The best approach when creating a plan during a crisis is to:
 - a) Identify the problem
 - b) Decide on a solution
 - c) Create a timeline
 - d) All of the above

Module Six: Review Questions

3. As you execute the plan you should continue to evaluate it.
- a) True
 - b) False
4. An important step to look at is see what is learned after a crisis is over as it will help prevent it from happening in the future.
- a) True
 - b) False

Module Six: Review Questions

- 5) What should help the number of crises you encounter decline?
- a) Better planning
 - b) Substandard efficiency
 - c) Decreased productivity
 - d) All of the above
- 6) In a crisis, which question will not help you gather and analyze the data?
- a) What events will this impact?
 - b) What happened?
 - c) Who is to blame for this?
 - d) Who else needs to know about this?

Module Six: Review Questions

- 7) What can be defined as “the time that you have before the situation moves out of your control, or becomes exponentially worse”?
- a) Planning time
 - b) Threshold time
 - c) Executing time
 - d) Decisive time
- 8) Which of these is not a step in creating a plan?
- a) Decide on a solution
 - b) Identify the achievement
 - c) Break it down into parts
 - d) Create a timeline

Module Six: Review Questions

- 9) During execution of a plan, what is important to remember?
- a) Identify the crisis
 - b) Deliver accurate, effective communication to everyone who will listen
 - c) Stay organized and on top of events to make sure that your plan is still applicable
 - d) Stop evaluating the plan once you start executing it
- 10) What disaster will you be unable to prepare for?
- a) Illness
 - b) Fire
 - c) Theft
 - d) None of the above

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Module Seven:

Organizing Your Workspace

In order to effectively manage your time and to be productive each day, you must create an appropriate environment.

By eliminating clutter, setting up an effective filing system, gathering essential tools, and managing workflow, you will be well on your way to create an effective workspace.

*The only thing even in this world is the number of hours in a day.
The difference in winning or losing is what you do with those hours.*

De-Clutter

- Working
- Reference
- Archival



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Managing Workflow

Select one task to do at a time

Time yourself

Ignore everything else

No breaks or interruptions

Give yourself a reward

Dealing with E-mail (I)

- E-mail is best handled in batches
- Create delivery rules
- Create folders for different topics



Using Calendars

- Organize tasks
- Identify patterns
- Improve workflow



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Module Seven: Review Questions

1. Which is not a part of a basic filing system?

- a) Working files
- b) DIY files
- c) Reference files
- d) Archival files

2. In managing workflow what are the four Ds?

- a) Do, Done, Deliver, Double
- b) Do, Decide, Defer, Detour
- c) Do, Done, Doubt, Decide
- d) Do, Delete, Defer, Delegate

Module Seven: Review Questions

3. One of the best ways to deal with email is to set up rules to filter emails to certain folders.

a) True

b) False

4. The acronym S.T.I.N.G can help when feeling overwhelmed; what does the G stand for?

a) Give up

b) Give yourself a reward

c) Go home when completed

d) Get it done

Module Seven: Review Questions

- 5) Which of these does not help to create an effective work space?
- a) Working around clutter
 - b) Setting up an effective file system
 - c) Gathering essential tools
 - d) Managing workflow
- 6) What types of files are used for materials used frequently and needed close at hand?
- a) Working files
 - b) DIY files
 - c) Reference files
 - d) Archival files

Module Seven: Review Questions

- 7) Which of these are not essential in an effective workplace?
- a) Telephone
 - b) Three trays to control the workflow on your desk
 - c) A pile of used post-it notes
 - d) Standard office supplies
- 8) If a task is not yours to do, how should you respond?
- a) Do it
 - b) Delete it
 - c) Defer it
 - d) Delegate it

Module Seven: Review Questions

- 9) Which of these is good advice for maximizing your e-mail time?
- a) Email is best handled constantly throughout the day
 - b) Once you know the subject of the message, open and read urgent e-mails and non-urgent emails (like jokes), and respond accordingly
 - c) Ask your e-mail contacts to use specific subject lines, and make sure to use them yourself
 - d) Move all email to your junk or trashcan when finished
- 10) For people with multiple responsibilities, what type of calendar might be especially valuable?
- a) A productivity journal
 - b) An annual calendar organized by areas of responsibility
 - c) A day-by-day calendar
 - d) A filing calendar

Module Seven: Review Questions

1. Which is not a part of a basic filing system?

a) Working files

b) DIY files

c) Reference files

d) Archival files

2. In managing workflow what are the four Ds?

a) Do, Done, Deliver, Double

b) Do, Decide, Defer, Detour

c) Do, Done, Doubt, Decide

d) Do, Delete, Defer, Delegate

Module Seven: Review Questions

3. One of the best ways to deal with email is to set up rules to filter emails to certain folders.

a) True

b) False

4. The acronym S.T.I.N.G can help when feeling overwhelmed; what does the G stand for?

a) Give up

b) Give yourself a reward

c) Go home when completed

d) Get it done

Module Seven: Review Questions

5) Which of these does not help to create an effective work space?

- a) Working around clutter
- b) Setting up an effective file system
- c) Gathering essential tools
- d) Managing workflow

6) What types of files are used for materials used frequently and needed close at hand?

- a) Working files
- b) DIY files
- c) Reference files
- d) Archival files

Module Seven: Review Questions

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Module Eight:

Delegating Made Easy

If you work on your own, there's only so much you can get done, no matter how hard you work.

One of the most common ways of overcoming this limitation is to learn how to delegate your work to other people.

At first sight, delegation can feel like more hassle than it's worth. By delegating effectively, you can hugely expand the amount of work that you can deliver.

The best executive is the one who has sense enough to pick good men to do what he wants done, and self-restraint enough to keep from meddling with them while they do it.

Theodore Roosevelt

When to Delegate

- An opportunity for growth of another person's skills
- Reoccurring tasks
- Non-critical tasks



To Whom Should You Delegate?

- Experience, knowledge, skills
- Time and resources
- Require supervision
- Current workload



How Should You Delegate?

- Initiates action, and then reports periodically
- Acts, and then reports results immediately
- Makes recommendation, and then acts
- Asks what to do
- Waits to be told what to do
- The Spheres of Independence

Keeping Control

- Brief your team members
- Available for questions
- Do not micro-manage
- Ask for solutions



The Importance of Full Acceptance

- Review it thoroughly
- Only accept complete work
- Recognize and reward



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Module Eight: Review Questions

1. You should keep this in mind when deciding if a task should be delegated.
 - a) Is the task an opportunity for growth of another person
 - b) Will delegating a task jeopardize any success
 - c) Weigh the effort to properly train another person against how often the task will reoccur
 - d) All of the above
2. When considering delegating a task, what criteria should you consider?
 - a) Can I fire them if they fail?
 - b) What is the current workload of this person?
 - c) What training or assistance might they need?
 - d) B and C

Module Eight: Review Questions

3. What is the first level of the Spheres of Independence?
 - a) Delegate waits to be told what to do
 - b) Delegate initiates action
 - c) Delegate acts, then reports
 - d) Delegate recommends what should be done
4. Micro-managing is one of the best ways to keep control and stay updated.
 - a) True
 - b) False

Module Eight: Review Questions

- 5) Which of these statements about delegation is true?
- a) There is shame in asking for assistance
 - b) By delegating effectively, you can only slightly expand the amount of work you can deliver
 - c) If you delegate well, you can quickly build a strong and successful team of people
 - d) At first sight, delegation will never feel like more hassle than its worth
- 6) Which of these tasks should not be delegated to others?
- a) Time-sensitive projects
 - b) Tasks that have been assigned specifically to you
 - c) A task that will provide an opportunity for growth
 - d) A meaningful of challenging assignment

Module Eight: Review Questions

- 7) What is not something that you need to explain to a delegate?
- a) Every exact step that you would take if you were doing the project yourself
 - b) The goals you have for the project
 - c) What's expected of them during the project
 - d) All timelines and deadlines
- 8) What is one way to encourage growth in a delegate?
- a) Delegate solutions to others when delegates come to you with a problem
 - b) Ask for recommended solutions when delegates come to you with a problem
 - c) Micromanage as needed
 - d) Abdicate control altogether

Module Eight: Review Questions

- 9) What is good advice when overseeing and approving delegates' work?
- a) Even if you accept work that you're not satisfied with, your team member will learn to do the job properly
 - b) If you accept work that you're not satisfied with, you won't be need to complete the project yourself
 - c) If you accept work you're satisfied with, it means that you don't have the time to do your own job properly
 - d) If you accept work that you are not satisfied with, your team member does not learn to do the job properly
- 10) When good work is returned to you, what should you do?
- a) Recognize the effort
 - b) Reward the effort
 - c) Take the credit for yourself
 - d) Both A & B

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 - b) Reward the effort
 - c) Take the credit for yourself
 - d) Both A & B

Module Nine: Setting a Ritual

Rituals and routines can actually help increase the spontaneity and fun in your life.

Because routine tasks are already planned for, you have more energy to spend on the tasks that will bring you closer to your goals and bring more joy to your life.

Discipline is the bridge between goals and accomplishment.

What is a Ritual?

Ritual

- Identify the time
- Sub-tasks
- Identify the task



Ritualizing Sleep, Meals, and Exercise

- Establish a ritual before you sleep
- Plan meals for the next week
- Try to exercise for one hour three times a week



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Example Rituals

- Lay out clothes the night before
- Prepare your lunch
- Batch together activities



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Using Rituals to Maximize Time

During a break read for ten minutes

Deep breathing and stretches

Clean off a small area

Update your journal

Set aside a lunch hour for personal errands

Module Nine: Review Questions

1. Which step is not a part of building a good ritual?
 - a) Identify the task
 - b) Set the task in stone
 - c) Identify the time and or triggers
 - d) Identify the sub-tasks
2. Which three items are essential to ritualize?
 - a) Sleep, meals, and exercise
 - b) Work, play, and driving
 - c) Sleep, work, and play
 - d) Collaboration, delegation, and procrastination

Module Nine: Review Questions

3. What is a “Trigger” in regards to setting up a ritual?
 - a) A situation or event
 - b) Exercise
 - c) Thought or idea
 - d) Specific time of day

- 4) What is the definition of a ritual?
 - a) A boring, repetitive life, with every moment controlled and managed
 - b) No room for spontaneity
 - c) An activity set in stone
 - d) Any practice or pattern of behavior regularly performed in a set manner

Module Nine: Review Questions

- 5) What is an example of an easy way to put exercise into your schedule?
- a) Three hours of swimming every day
 - b) Take a half hour to plan exercises for the next week
 - c) Do yoga in the morning before work
 - d) Exercise for a different length of time on a different day of the week
- 6) Which of these is not an example of a ritual that many people find helpful in maximizing their time?
- a) Check e-mail, news, and Web sites throughout the day
 - b) Set up a system for maintaining your Productivity Journal.
 - c) In the morning, perform your tasks in an organized, routine manner.
 - d) Lay out your clothes and prepare your lunch the night before for maximum efficiency

Module Nine: Review Questions

- 7) What is not a good idea to have as part of your sleep ritual?
- a) Filling out your Productivity Journal for the next day
 - b) Vigorous exercise right before sleep
 - c) Enjoying a cup of tea
 - d) Taking a warm bath
- 8) Once you have been using a ritual for a while, what might you find?
- a) That you have to constantly remind yourself of the ritual
 - b) That you cannot live your life without things happening at exactly the same time every day
 - c) That your day before repetitive
 - d) That you have bits of extra time here and there

Module Nine: Review Questions

- 9) Which of these is a good idea for ritualizing meals?
- a) Appliances like slow cookers and delayed-start ovens can also help you make sure supper is ready when you are
 - b) Spend your weekend making meals for the week to come
 - c) Make a grocery list and do a comprehensive shopping trip in several grocery stores
 - d) Take two hours each weekend to plan meals for the next week
- 10) What is not an example of situation or event that will cause a ritual to come into play?
- a) Take ten minutes to update your Personal Productivity Journal
 - b) Take an hour to do some deep breathing and stretches
 - c) Take five minutes to clean off your desk or some other small area
 - d) During a break at home, read for ten minutes

Module Nine: Review Questions

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Module Ten: Meeting Management

Few people look forward to meetings, and with good reason.

Too many meetings lack purpose and structure.

However, with just a few tools, you can make any meeting a much better use of everyone's time.

History is written by people who attend meetings, and stay until the end, and keep the minutes.

Deciding if a Meeting is Necessary

- Participants
- Observers



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Using the PAT Approach

- Purpose
- Agenda
- Time



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Building the Agenda

TIME	ITEM	PRESENTER
2:05-2:10	1. Agenda and Meeting Purpose	Jill Smith
2:10-2:20	2. Review of Current Invoice Signing Process	Joe King
2:20-2:40	3. Review of New Invoice Signing Process	Joe King
2:40-2:50	4. Questions and Answers	Joe King
2:50-2:55	5. Wrap-Up	Jill Smith

Keeping Things on Track

- Stick to the agenda
- Follow up on missed items
- End on an agreement



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Making Sure the Meeting was Worthwhile

Summary

Action items:

Time

Progress

Follow up:

Agenda



Module Ten: Review Questions

1. Using the PAT approach is great for meeting management. What does PAT stand for?
 - a) Past, Approach, Tracking
 - b) People, Alternate, Task
 - c) Postpone, Again, Today
 - d) Purpose, Agenda, Time frame
2. When creating an agenda it is best to hand it out at the beginning of the meeting.
 - a) True
 - b) False

Module Ten: Review Questions

3. What should you do if an item runs past its scheduled time?

a) Ask the group what they want to do

b) Skip it and move to the next item

c) Finish it and extend the meeting

d) Remove the next item on the agenda

4. Action items should be clearly indicated, with start and end dates.

a) True

b) False

Module Ten: Review Questions

- 5) What is a reason that people generally do not look forward to meetings?
- a) Meetings are always held early in the morning
 - b) Too many meetings lack purpose and structure
 - c) Too many meetings bring together co-workers and this creates conflict
 - d) Meetings are held daily and become repetitive
- 6) If a formal meeting is necessary, what two groups should you divide your attendees into?
- a) Minute takers and chairpersons
 - b) Attendees and non-attendees
 - c) Supervisors and lower level employees
 - d) Participants and observers

Module Ten: Review Questions

7) In the PAT approach, which step is described as “the backbone of the meeting”?

- a) Agenda
- b) Approach
- c) Purpose
- d) Time frame

8) Typically, how long should meetings be?

- a) They should exceed an hour
- b) They should not exceed two hours
- c) They should not exceed one hour
- d) They should not exceed thirty minutes

Module Ten: Review Questions

- 9) What is your job as the chairperson of the meeting?
- a) To take minutes
 - b) To keep the meeting running according to the agenda
 - c) To ensure all participants are in attendance
 - d) To supervise participants' behavior during the meeting
- 10) What is an action to take at the end of a meeting?
- a) Get agreement that all items on the agenda were sufficiently covered
 - b) Decide if a formal meeting is necessary
 - c) Make a list of what needs to be discussed, how long you believe it will take, and the person who will be presenting the item
 - d) Make sure you ask for everyone's approval, including additions or deletions

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Module Eleven:

Alternatives to Meetings

Sometimes, a face-to-face meeting isn't the best solution. In this module, we will explore alternatives to meetings that can help you and your team save time and be more productive.

Don't forget that even if you use a meeting alternative, you should still use the PAT approach that we discussed in the last module, take minutes, and distribute post-meeting notes and action items.

Our meetings are held to discuss many problems which would never arise if we held fewer meetings.

Instant Messaging and Chat Rooms

- Stick to an agenda
- Ground rules
- Minutes



Teleconferencing

- Screen sharing
- Interactive whiteboards
- Recordable



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editable content based ppt files

E-mail Lists and Online Groups

- Moderator
- Ongoing interaction
- Have a purpose



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Collaboration Applications

Collaborate

- SharePoint
- Skype
- Write



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Module Eleven: Review Questions

1. When hosting a meeting in a chat room using an agenda is not a good idea.

a) True

b) False

2. When teleconferencing it is recommended to use the PAT approach.

a) True

b) False

Module Eleven: Review Questions

3. What should you keep in mind when using online groups?
 - a) Be sure to have a moderator
 - b) Monitor users time
 - c) Have a purpose
 - d) All of the above

- 4) Which of these is a great alternative to meetings, especially if meeting members are separated by distance?
 - a) Face-to-face meetings
 - b) In-house meetings
 - c) Chat rooms
 - d) Email

Module Eleven: Review Questions

- 5) Which of these is important to remember when hosting a meeting via instant messaging applications or chat rooms?
- a) Set some ground rules at the beginning of the meeting to eliminate distractions such as emoticons, sounds, and acronyms
 - b) Don't have an agenda, as it will be impossible to keep on track
 - c) The minute taker's role in keeping things on track is more important than ever
 - d) Make sure you dispose of the record of the meeting
- 6) Which of these is not an application to try for instant message applications and chat rooms?
- a) Campfire
 - b) Meeting Pal
 - c) Microsoft Access
 - d) Microsoft Office Communicator

Module Eleven: Review Questions

- 7) Which of these is not a feature of most teleconferencing applications?
- a) Screen sharing
 - b) Windows Live Messenger
 - c) Interactive whiteboards
 - d) Voice and text chat support
- 8) If your meeting group requires ongoing, interactive communication, rather than periodic face-to-face gatherings, what would be an effective tool?
- a) Email list
 - b) Forum
 - c) Online group
 - d) All of the above

Module Eleven: Review Questions

- 9) What is a good thing to keep in mind if you plan on using Google Groups, Yahoo Groups, and Convos?
- a) You'll want an informal atmosphere where participants stay off topic
 - b) Make sure you encourage the participants to use these tools as much as possible without your monitoring
 - c) Having a moderator is essential
 - d) Just like a meeting, an online list or group should not stick to a purpose
- 10) What is a more sophisticated electronic tool that can reduce the need for meetings?
- a) Email
 - b) Google groups
 - c) Collaboration applications
 - d) Campfire

Module Eleven: Review Questions

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 - c) **Collaboration applications**
 - d) Campfire

Module Twelve: Wrapping Up

Although this workshop is coming to a close, we hope that your journey to improve your time management skills is just beginning.

Please take a moment to review and update your action plan. This will be a key tool to guide your progress in the days, weeks, months, and years to come.

It has been my observation that most people get ahead during the time that others waste time.

Words from the Wise

Steve Jobs: *Your time is limited, so don't waste it living someone else's life.*

Benjamin Franklin: *You may delay, but time will not.*