



UNIT-3

Information Management

Learning Outcomes

By the end of this unit the learner will be able to:

- Apply the 80/20 rule and learn how it should affect planning
- Identify the characteristics of a good organizational system
- Develop a plan for an efficient workspace, including a customized information center and a filing system

Unit 3

Information Management

Setting Up Your Information Management Center

Key Components of a System

Getting Started

Let's look at the ideal structure for your information center. Each component must be kept in a consistent place. For example, all tasks lists should be electronic or paper-based. However, you might have some electronic components and some paper-based components. That's OK!

Calendar

Purpose

Used to keep track of all appointments and follow-up reminders.

Format

- If paper-based, have one to two pages per day (enough room for appointments and tasks).
- If electronic, it should support reminders, color-coding, adding notes, and easy search and sorting options.

Projects Notebook

Purpose

Keep track of project ideas, "someday" items, and other miscellaneous information.

Format

- If paper-based, should have tabs from A-Z, such as a three-ring binder with index tabs.
- If electronic, it should be organized alphabetically.

Communications Log

Purpose

- Keep track of voice mails sent and returned.
- Things to mention to people you frequently communicate with.

Sections

- Voice Mail Log: One message per sheet. Be sure to include the date and time, person calling, their organization, essence of the message, callback number, and due date. Text messages can also be logged here. If necessary, move completed call sheets to a folder in your archive files. (Make sure they are organized by month.)

- Communication Log: Keep one sheet for each person that you regularly communicate with. Note things to tell them, questions to ask, items to return, etc. The next time that you see that person, grab their sheet and give them the necessary information. Then, toss the current sheet and start a new one.

Format

- If paper-based, should have section for each area, with people organized alphabetically (perhaps with index tabs).
- If electronic, it should be organized alphabetically.

To-Do List

Purpose

Keep track of things that need to be completed.

Tips and Formats

- There is a lot of debate about to-do lists. Some people swear by them, while others abhor them. If you find them useful, use them (but properly). If you don't find them useful, don't use them! Your incubator, priority tray, and calendar may be enough to keep you up to date.
- Most e-mail programs feature the ability to track tasks, monitor completion, and assign reminders. You can also get specific programs to manage tasks. We recommend using something that is integrated with your e-mail program, however.

The Running List Method

- Some people keep a running paper list, crossing off items as they are complete and adding items as they come up.
- If you choose this method, make sure you include due dates and highlight your top three tasks so you don't get overwhelmed.
- Start a fresh list periodically.

The Daily List Method

- At the *beginning of each day*, write down what you need to accomplish, based on e-mail, your incubator file, voice mail, and any other information sources.
- *During the day*, write down anything that will take more than three minutes to do. (Future tasks should be filed in your incubator, with a reminder on your calendar.) Cross off items as you complete them.
- At the *end of the day*, review uncompleted items. Start a fresh to-do list for the next day and add any items to be completed tomorrow. For future items, file them in the incubator with a reminder on your calendar.
- If you find yourself re-writing an item three days in a row, ask yourself why it isn't getting done. Do you need to delegate it? Set a deadline for it? Break it up into smaller tasks?

- This type of list works best when you have a few large tasks to accomplish each day with not much change during the day.

Case Studies

Sarah the Salesperson

Sarah is a salesperson with a high-tech firm. She loves her laptop! She uses different Microsoft Office programs as her information center.

- Microsoft Outlook handles her to-do list and calendar. She also uses Outlook's reminders to help her act on e-mails in time. She uses the Notes feature to track things to tell her colleagues and her manager.
- She has a Projects notebook set up in Microsoft OneNote, divided into different sections of the alphabet (A-E, F-J, etc.), with a page for each letter. She tracks ideas for products and services here. Then, she can present them at the quarterly brainstorming meeting.
- She uses her company's custom sales application, which integrates with Outlook, to help her manage voice mail and calls to make.

Walter the Writer

Walter is a great writer, but he's pretty old fashioned when it comes to managing his work. His three-ring binder is his lifeline! He has it organized into the following sections:

- **Calendar:** Contains standard daytimer pages with two sheets per day. He writes appointments on one sheet and tasks on another. He updates his to-do list at the beginning and end of each day. He doesn't get much voice mail; when he gets a message he adds a sheet of loose-leaf with the details.
- **Ideas:** This is his version of the Projects notebook. He has index tabs from A to Z with loose-leaf in each section. He writes down ideas for upcoming books in this area, using the topic to decide what letter it falls under. By starting a new sheet for each book, he has lots of space to track his ideas.
- **Research:** At the back of the binder, Walter has a special section for research, ideas, and notes for his current project.

Edna the Executive Assistant

Edna is an assistant to three busy executives. She uses an internal, network-based mail, calendar, and tasks program to manage their calendar and tasks. She also keeps her appointments in this program so that the executives can view her calendar and book appointments for her.

How will you manage your calendar, project ideas, communications, and tasks?

What other custom components will you need?

What changes will you need to make?

What will you take directly from our suggestions?

What will be your first step?

What will the end result look like?

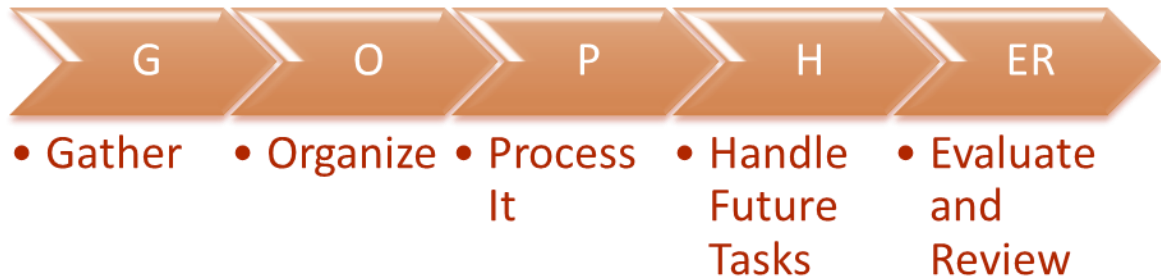
How will this change how you work?

Managing Information in Six Easy Steps

GOPHER It!

Process Overview

When you receive a piece of information, what do you do with it? GOPHER it!



G = Gather

To start, gather all the information together. Some examples:

- Download your e-mail
- Record your voice mails
- Pile all of those meeting minutes together

Handle only one type of information at a time.

O = Organize

Then, sort the information in a way that makes sense. Examples:

- Sort your e-mail by date
- Prioritize voice mails
- Organize minutes chronologically

P = Process It

Use our 3D system to identify how to handle the task.

- **Discard:** Throw out anything that you don't need.
- **Delegate:** Pass on any tasks that can or should be done by others.
- **Do:** If the task can be completed in three minutes, do it! Otherwise, set it aside for the next step.

Some examples:

- Deal with e-mails that can be handled quickly; defer or delegate others
- Return phone calls
- File or discard minutes as appropriate

H = Handle Future Tasks

Record future tasks in your to-do list, incubator, or calendar as appropriate. This is also the time to share the information with others and create reminders for preparation tasks.

ER = Evaluate and Review

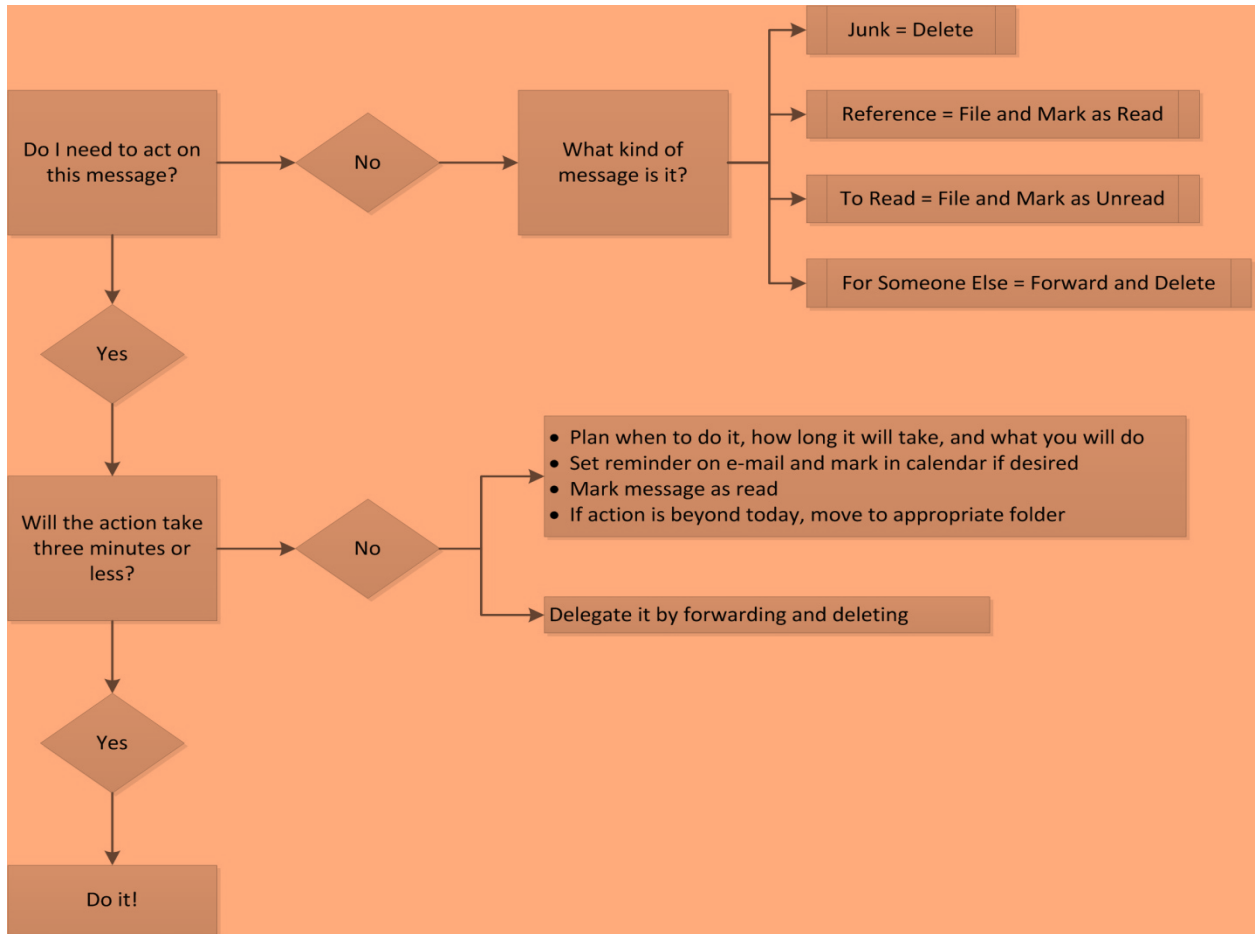
When you're all done with the item(s), ask yourself, "What else needs to be done with this information?" If there's nothing else, congratulations! Start back at the beginning and **gather** the next type of information. If there are other things to do, go back to **processing** the remaining information.

Finally, book an appointment with yourself once a week, preferably on Friday afternoon, for a **weekly review**. Complete the following tasks:

- Clear out any items that have been stuck in your priority box and/or to-do list. Identify what needs to be done with them and make a plan to do it.
- Gather and process all information: outstanding files, that pile of meeting minutes you've been avoiding, etc.
- Identify where you did well and where you could have done better. What changes do you want to make to your system? Make a plan for implementing them.
- Write down one thing that you will do next week to be even more organized and productive.
- Review your upcoming week. Record any tasks, thoughts, reminders, etc. that will help you stay on top of things.
- Congratulate yourself on a week well done!

Processing E-Mail Messages

Let's take a minute to talk about one of everyone's big challenges: e-mail. Handling e-mail can be overwhelming. Start by focusing on one e-mail, preferably the oldest item. Scan the subject line in it, and then select it and any other messages that you will handle the same way. Then use this flow chart to help you decide what to do with it. (This is basically a re-wording of the steps in the H phase of GOPHER!)



You should spend no more than 10 seconds on each message, unless it is something that you can clear out of the way right now.

Digging Donald out of the Hole

Donald has gotten a little behind in dealing with information that crosses his desk! To get started, he's made a list of problem areas.

- Three stacks of mail in different places
- 200 messages in my e-mail inbox
- Voice mail is probably overflowing; afraid to check
- Several memos sitting on the corner of my desk
- Pile of invoices from accounting to be filed
- Monthly report needs to be finished in four days; not sure where the information is or how to start
- Stack of promotional materials to be reviewed and distributed

Pick two or three of these problems and use the GOPHER plan to help dig Donald out of the hole.

Problem One: _____

G: Gather

O: Organize

P: Process

H: Handle Future Tasks

E: Evaluate

R: Review

Problem Two: _____

G: Gather

O: Organize

P: Process

H: Handle Future Tasks

E: Evaluate

R: Review

Problem Three: _____

G: Gather

O: Organize

P: Process

H: Handle Future Tasks

E: Evaluate

R: Review

Further Reading: