



Unit-2

Planning for Success

Learning Outcomes

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

- ✓ Adjust to the supervisor's role with confidence.
- ✓ Develop your skills in listening, asking questions, resolving conflict, and giving feedback to employees.

- Live and work in Italy for two years.

Now, clearly some of these are achievable in the short term while others will take longer. Some will obviously take more work than others. So where do we start?

Setting Goals with SPIRIT

Each objective should be broken down into several small, achievable goals that will help you get where you want to go. Good goals should have SPIRIT!

Specific

Be specific about what you want or don't want to achieve. The result should be tangible and measurable. "Be a great supervisor" is pretty ambiguous; "Achieve a top rating in the Supervisory category on my next performance review" is specific.

Prizes

Reward yourself at different points in the goal, particularly if it's long-term. If your goal is to reorganize your office, for example, you might purchase a piece of artwork after you get the clutter cleaned out.

Individual

The goal must be something that you want to do. If your manager wants you to reorganize your office, but the layout works for you, you're not going to want to work towards the goal.

Review

Review your progress periodically. Does the goal make sense? Are you stuck? Do you need to adjust certain parts of it?

Inspiring

Frame the goal positively. Make it fun to accomplish. You could make a poster of the end result, frame it, and post it on the wall.

Nothing breaks down morale like continual crises.

Employees appreciate routine.

They like going home at night fairly certain of what they will do tomorrow and that the tasks will be ones they feel able to do. If you show them you can schedule work smoothly, employees will feel more like pitching in when the occasional emergency or a project that requires extra time and energy from them.

Getting Things In Order

In some workplaces, it seems to be impossible to get everything done. This session will help you to prioritize what does need to be done and sort it out from things that you could do, but may not have the time to finish.

Brian Tracy wrote a great little book called *Eat that Frog!* that helps people get over procrastinating. He also plays with a couple of quotes from the writer Mark Twain that help us to remember what we are meant to do, and how to stop putting things off. The idea is this:

“If the first thing you do each morning is to eat a live frog, you can go through the day with the satisfaction of knowing that is probably the worst thing that is going to happen to you all day long.”

We are often guilty of procrastinating, and this stops us from getting things done. And as you likely already know, when we procrastinate about one thing, it can also interfere with getting other things done.

Here is another quote from Mark Twain that we like: “The rule of frog eating is this: If you have to eat two frogs, eat the ugliest one first.”

This quote is about taking the frog – the thing we are procrastinating about – and getting on with eating it. Clearly, after you’ve eaten a great big frog, everything else you have to do that day is going to be easier than what you started off with.

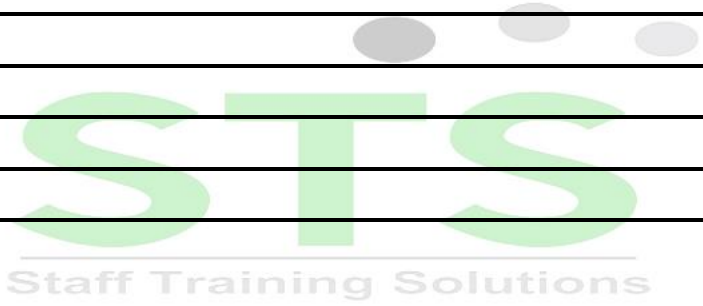
By procrastinating, that thing we are putting off often becomes a bigger and more daunting task than it really is, and the more we think about (rather than doing something about it), the more space it can take up in our head.

This is a very simple concept that can have a profound impact on our results. There is no self-satisfaction in knowing that we are letting things get away from us, and we feel better and more motivated when we go ahead and get these things crossed off our to do lists.

Test your knowledge

Do you have a frog or two waiting for you at work?

What is standing in the way of eating that frog?



Mastering E-mail

Putting Things in Perspective

One of the greatest demands on our time is e-mail, and so it is important to put it in proper perspective with the demands of our jobs. We've become a society where we expect replies to e-mail immediately, and where we send e-mails out to more people (and with more frequency) than is often required. While e-mail has become a benefit in many ways, it is also a huge contributor to people's stress. And it's not enough to just have e-mail you can check on a computer somewhere either; many managers are issued a hand-held device that allows them to be connected to their e-mail 24/7.

Calculating Your Time

If you consider e-mail in terms of time, let's see what kind of an impact it has on your day.

How many e-mails do you receive in an average day? _____

How many of those e-mails do you reply to? _____

How many e-mails do you send (not including the replies above)? _____

Let's say that an average e-mail takes you three minutes (and that is only if they are short and need very quick thinking on your part). **Take the total from above, multiply it by three minutes per incident, and put the total number of minutes per day that you manage e-mail right here:** _____.

Since we normally have lots of additional tasks in the day in addition to e-mail (like meetings, administration, performance management, and coaching), is it any wonder that we struggle to get through the day? Add to this the time you might take to read reports, meeting minutes or agendas, process information or work on projects, the need for a healthy lunch, and perhaps some time spent invested in your people, and it's no wonder we are often looking for more time.

Tips for Tackling the E-Mail Monster

Check your e-mail only a few times a day. (We suggest first thing in the morning, after lunch, and at the end of the day. However, you should find two periods that work for you.) This will stop your e-mail from interrupting you over and over again and allow you to get more done. You can set most e-mail programs up to check for new messages on your schedule and turn the notifications off altogether so that you get to your mail when it makes sense for you to do so.

For those of you who are addicted to your e-mail, this can be a hard switch to make. If you have trained people so that they know you answer e-mails 24/7, and always right away, you will have to adjust their expectations so that they know how often you check your e-mail. Try it for a week and then see just how much more relaxed your work pace becomes, and how much more you can accomplish.

Try to read an e-mail only one time and decide what you want to do with it as you read it. Our rule of thumb is that if it takes three minutes or less, reply immediately. Any longer than that and you need to set it up as a task or in your calendar, or delegate it to someone else. Do not leave e-mails open to answer when you get a chance. When we do this, we tend to have multiple tabs open, and then we have to re-read all those open e-mails to decide what to do with them.

Consider whether e-mail is the best way to deal with something, or whether another method is more efficient. E-mails that go to large groups of people and have multiple strings of replies and information are often best dealt with in a meeting or conference call.

Time Management Tips

Time can get away on all of us, but if this happens regularly, we will never get caught up! Here are some time management tips that are collected from efficiency experts. You will find that if you implement even a few techniques at a time, your productivity will improve enormously.

- You can save yourself an hour a day by getting organized. Did your mother ever tell you that there was “a place for everything and everything in its place”? The lesson there is to put things away and know where you put them. There is no need to do a big clean up once a year if you can take a half-hour once a week to file, sort, and keep things organized.
- It is important to identify and operate within two time horizons: short and long term. Anticipating events allows things to get done in the short term which contribute to achieving long-term objectives.
- An up-to-date master calendar can be your most helpful planning tool.
- When things begin to get hectic, a "Things to do today" list can help you focus your attention on the highest priority items.
- Action planning worksheets, milestone charts, and PERT diagrams are excellent planning aids when properly used.
- Planning contact with colleagues and staff will help minimize the disruption of their schedules. Keep a file for each person you meet with on a regular basis, with items to be discussed.
- The most effective approaches to planning are those tailored to meet individual needs. Concepts, procedures, and worksheets are all subject to modification to fit individual circumstances.
- Experts say nothing should be attempted without prior planning, but there must be flexibility.

For every plan you make, cover these points:

- What
- Where
- When
- How
- Who

Putting Plans into Action with Scheduling Aids

Some useful short-term planning aids:

- A daily to-do list
- A planner with at least a week at a glance
- A monthly project list

- Project planning worksheets

Organizing Your Work Area and Your Paperwork

A clean desk is not a sign of an empty mind! Don't fall prey to the false notion that a messy work area means you're busy and therefore productive. Being active is not the same as being productive. Here are some tips for organizing your work area.

Do it now!

Anything that takes less than 30 minutes should be done as it comes up. Otherwise, we tend to procrastinate.

Dump.

Throw out or take home all the things you have collected that you don't need or use.

Sort and group.

Your desk should be organized logically: pencils and pens in one place, another place for letterhead and envelopes. Have a basket for projects and another one for priority items so that you can locate the things you need when you want them. You can use the same kind of system on your computer so that you can find your working files. Once a project is complete, move it into an appropriate folder for retention.

Set up a system.

Use an electronic or paper planner to jot down your daily to-do list and schedule in any tasks that will take longer than 30 minutes to do. Prioritize each item so that you know what to work on, and make sure that you stick to the list (with some flexibility for emergencies, but making sure you get back to priorities as soon as possible).

Don't save papers you can easily find somewhere else.

Don't ask yourself, "Is there a chance I will need this someday?" because the answer is nearly always yes. Ask yourself, "If I know I need this, do I know how to find it?" One of our biggest time-wasters is searching for information that we know we have but we can't find. If a piece of paper or a file is important enough to save, it is important enough to file for retrieval.

Get colorful!

One technique that we like is to use color-coded files for paper. If you put your current projects in a red or purple file, let your colleagues know that they must not, under any circumstances, cover up a purple

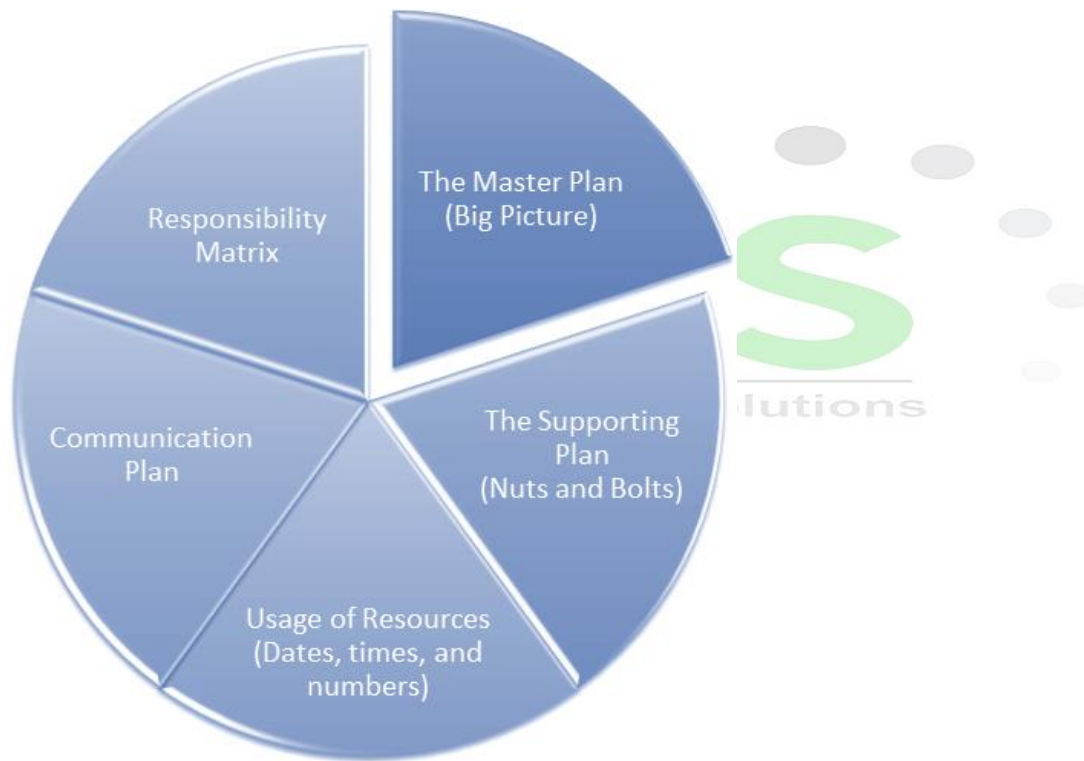
file on your desk. That way you will always know where they are. Once you are finished with that particular project, move the contents to a permanent beige file for storage, or have them scanned and filed on your computer in the appropriate place.

With electronic files we also recommend that you update the properties section of your documents. In that section, you can add keywords or tags as well as update the author's name. These functions will help enormously if you have to search for the file later on.

The Parts of a Good Plan

The Five Parts

A good plan has five parts.



The Master Plan

This is the big picture: what will be done by when, by whom. For example: A new office building will be built by June 1, 2020, at a cost not to exceed ten million dollars.

Remember to always have a Plan B, because things can change.

The Supporting Plan

This plan includes the details. Continuing with the example of building a new office, some possible supporting plan points could include:

- Building will be 5,000 square feet
- Will need built-in wireless Internet service
- Building will be located at 510 Acme Lane

Usage of Resources

What time, people, and resources will be needed to complete the plan?

Responsibility Matrix

Who will be responsible for what, and why?

Communication Plan

Who will need to know what during the project? How will you let them know?

The Next Steps

Setting goals or targets is just the start of the planning process. Each goal or target needs strategies or action plans to help you get to where you are headed. For example, if one goal for your department is to reduce overtime by 10%, just exactly what do you plan to do to accomplish that goal? Wishful thinking and dreaming have no place in your action plan.

Determine what resources you need, in terms of time, people, money, or equipment. Can you get them? Are they ready? What needs to be done? What if they aren't available?

Finally, the planning stage gives way to implementation. Research indicates that for every hour of planning time, you save three or four hours of work time, so don't fall victim to the common belief that you don't have time to plan. You don't have time not to!

Suggestions to Maximize Planning and Prioritizing

- Write a to-do list. Everybody knows this is an effective time-management strategy and yet hardly anybody actually does it. Put your to-do list where you can see it (on your computer or on paper) so you know what you need to accomplish.
- Plan tomorrow today. Take five or ten minutes at the end of the day to make up tomorrow's to-do list so you can start fresh tomorrow and not spend the rest of today fretting about it. At the end of the week, it can be very helpful to not just plan the first day of next week but to list those things you REALLY want to accomplish next week.
- Revise your plan. Stay flexible. Check your to-do list several times throughout the day, and if necessary, postpone, rearrange, and even procrastinate on purpose.
- Make at least one appointment with yourself each day. Give yourself one hour of prime time every day to work on top priority items. This is uninterrupted time at a time when you are personally most effective. (How can you do this? Come in early, stay late, trade off time with a colleague, work in another area, close your door, use your voice mail, and/or write in a one-hour appointment with yourself on the calendar.)
- Consolidate activities. Shorten your to-do list by grouping like items together. Group activities by category: make calls, work on reports, etc. Or group priorities into A, B, and C priorities. Watch out for "C" priorities that don't need to be done at all or could be delegated to someone else.
- Make time every day to work on your progress tasks, the priorities that will move you forward and tie into your goals. Don't put these on the back burner.
- Use a system that works for you. Some people prefer a paper day planner while others use computer software. Just be consistent.
- Remember that your top priorities are the tasks your manager has asked you to do.

Remember to document what you do, because someone is sure to ask.

Further Reading: