

Time Management - Using the Franklin Planner

Objectives:

- 🕒 Identify Values
- 🕒 Set Goals
- 🕒 Using The Planner



Time Management

We all have priorities. We all have responsibilities and opportunities that we consider most important. In the pressure of everyday living, we often find ourselves spending too much time dealing with things that aren't the most important.

That's why time management is such an essential skill to learn and master. The best way to manage your time to know exactly why you want to manage it!

Time and tide wait for no man.

14th Century philosopher Geoffrey Chaucer



Can You Manage Time?

First we must gain the right perspective on the term "Time Management"

As a manager you manage

- 🕒 People
- 🕒 Projects
- 🕒 Money

But time is not sometime we have any control over. Time passes with out our permission. It doesn't consider circumstances or problems. We can be clever, strong or rich, but nothing we do changes the passing of time.

Though we use the image of a modern clock to represent time management, a more accurate image is the sun dial. This ancient tool demonstrates with harsh clarity that time is a tyrant that has no concern for the circumstances of mankind.

While I am not saying not to use the term Time Management It's important to realize we cannot actually impact time.

Time is always in forward motion, moving from the present into the future creating the past. There are things that we have more control over than others. We must focus on the things we can control in order to adjust to the things we can't

To start improving your time management results you must understand where you spend your time. Do you operate based on a plan that is linked to your goals? Or are you forever reacting to life as it comes at you?

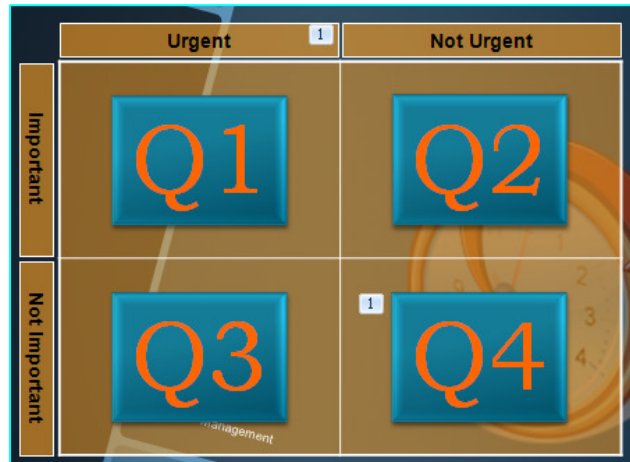


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The Time Matrix

Let me introduce you to the Time Matrix. This visual was developed by Steven Covey in his book *First Things First*.

The chart can help you to determine what kind of activities you spend most of your time on. As you can see the chart is divided into 4 quadrants. We call them Q1, Q2, Q3, and Q4



- 🕒 **Q1 activities** are urgent and important.
 - Deadline-driven projects
 - Crisis
 - Medical emergencies
 - Pressing problems
 - Last-minute preparations
- 🕒 **Q2 activities** are not urgent but important
 - Preparation/planning
 - Prevention
 - Values clarification
 - Exercise
 - Relationship-building
- 🕒 **Q3 activities** are urgent but not important
 - Interruptions, some calls
 - Some mail & reports
 - Some meetings
 - Many “pressing” matters
 - Many popular activities
- 🕒 **Q4 activities** are neither urgent or important
 - Trivia, busywork
 - Junk mail
 - Some voice mail/email
 - Time wasters
 - Escape activities
 - Viewing mindless TV shows

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We must understand that time is not renewable. There are 1440 minutes in a day. There will never be more or less. The only way to become more productive with your time is to become more efficient at where you spend it.

Once you know where you spend your time, you can then begin to make changes to become more effective.

Manage Q3 – be aware that when someone brings you their urgency, when you commit to helping or doing it, it becomes your responsibility and maybe eventually your emergency

Delete Q4 – Stop engaging in meaningless activities that do not contribute to your long term goals.

Focus on Q1 and Q2 activities to become more productive and achieve more of your planned goals.

What Are Your Posteriorities?

Author Brian Tracy said to manage your time you must establish Posteriorities, or put things behind you.

- 🕒 You will only begin to accomplish new more important activities when you stop spending time on less productive activities
- 🕒 Identify the activities that when eliminated or decreased will yield the greatest time benefit

Start With a Plan

- 🕒 Evaluate yesterday's results
- 🕒 Decide today's priorities
- 🕒 Review your long term goals
- 🕒 What tasks from your list of goals can you put into action?

Decide what is Important

- 🕒 Instead of making a to-do list
- 🕒 Create a prioritized task list
- 🕒 Be clear on what you will spend your time on and why
- 🕒 Protect your time
- 🕒 Be proactive
- 🕒 Decide to operate with in Q2
- 🕒 Reduce Q3 activities
- 🕒 Delete Q4 activities
- 🕒 Avoid reactive prioritizing

Setting up Your Planner

If you this is your first month using your planner load your seven ring binder as follows:

- 🕒 Cover page
- 🕒 Instructions for use
- 🕒 Current month calendar tab
- 🕒 Current month filler pages
- 🕒 Plastic page separator in today's date page
- 🕒 Next 2 months calendar tabs and filler pages
- 🕒 Planning calendar
- 🕒 All other section tabs go behind the planning calendar
- 🕒 All remaining calendar tabs and filler pages go in the 3 ring storage binder

- ➔ After your first month you should always have the previous month calendar and pages, the current month calendar and pages and next month's calendar and pages in your planner.
- ➔ In other words you will not remove page from your planner until after the second month of use.

The many uses of your Franklin Planner

- ➔ Record Values
- ➔ Goal Management
- ➔ Task management
- ➔ Calendar management
- ➔ A record keeper
- ➔ Contact manager
- ➔ Journal and Note Book

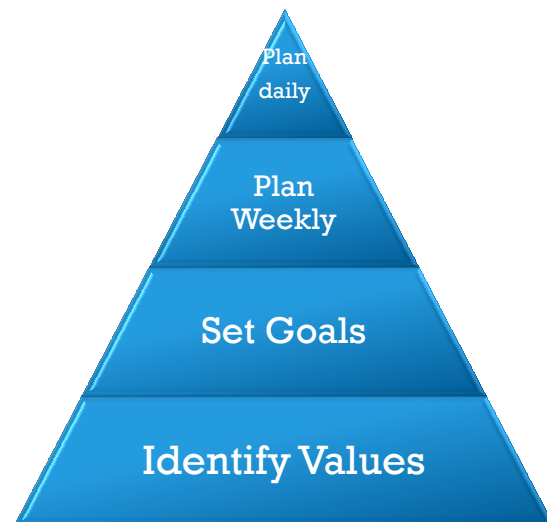
First Things First

Before we discuss how to use your planner, to be truly productive discover what the driving force in your life is.

Defining Values

The Franklin Planner is designed so that you can plan your daily activities in harmony with the deepest values and principles that govern your behavior.

Record your values in order to stay on track and stay true to your core principles.



Mission Statement

Turn your values into a mission statement. Writing your mission statement will help you live life moving toward that mission. One the most powerful methods to cultivate direction and purpose, is to create and live by a personal mission statement. Your mission statement connects your values to your goals. This process helps you develop the qualities that make life meaningful. It provides clarity of purpose and keeps you focused on your goals and actions.

A life of true purpose begins with a vision focused on what is important to you. Writing a mission statement helps to identify your creed for living your life exactly the way that you want to live it.

Your Mission Your Way

Ask yourself these questions:

- What do I want to accomplish?
- What are my strengths?
- How do I want to be remembered?
- Who has impacted me most?
- If I had unlimited resources what would I do?

Setting Goals

Long range goals are dreams with deadlines. They provide a link between your core values and your weekly and daily activities. By organizing long range goals into smaller, more manageable steps, you consistently accomplish what matters most in your life.

- Weekly planning helps you incorporate these smaller steps into your week and day.
- Daily planning enables you to prioritize your daily tasks and stay focused.

To set an effective long-range goal, ask yourself three vital questions:

- What do I want to accomplish?
- Why do I want to do it?
- How will I do it?



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Plan your goals

- Relate your goal to one of your values or your mission statement
- Record your goal
- Begin to record the steps necessary to complete your goal
- Record all of the steps you know and add the ones you learn as you complete each step

This will be an ongoing process until you complete your goal. Prioritize each step to determine importance of each associated action.

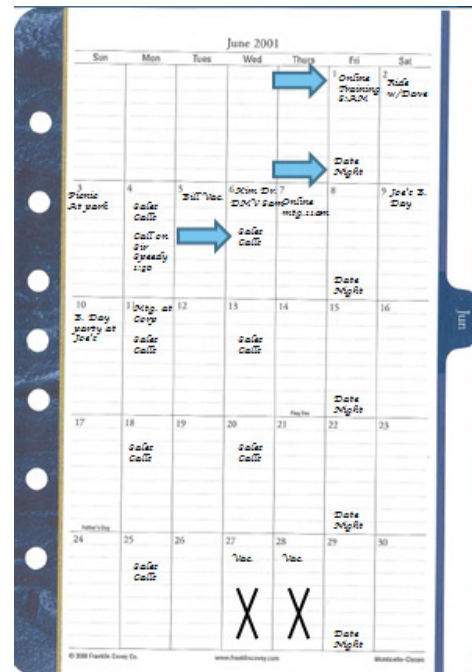
Using the Franklin Planner

- Monthly Calendar
- Master Task List
- Monthly Index
- Daily Prioritized Task List
- Appointment Schedule
- Daily Notes/Daily Record Of Events
- Address Book

The Monthly Calendar

This is where you record all appointments, events, and special dates. Your monthly calendar is used to plan where you are physically. You can also record team events and appointments so that you know how best to schedule store operations.

- Review your calendar in the morning and again in the evening
- Record details relative to the time of day
 - Morning on top
 - Afternoon middle
 - Evening bottom
- Use names for the events of others
- Block unavailable time
- As you add items to your calendar also go to the corresponding date to add it to the appointment schedule.
- Include the duration of the event



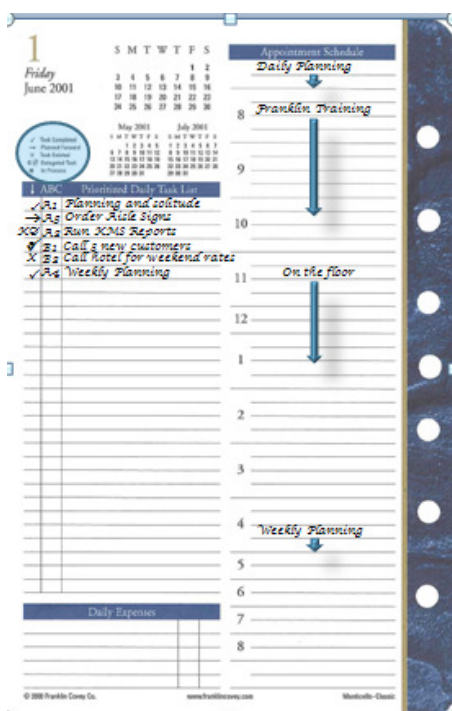
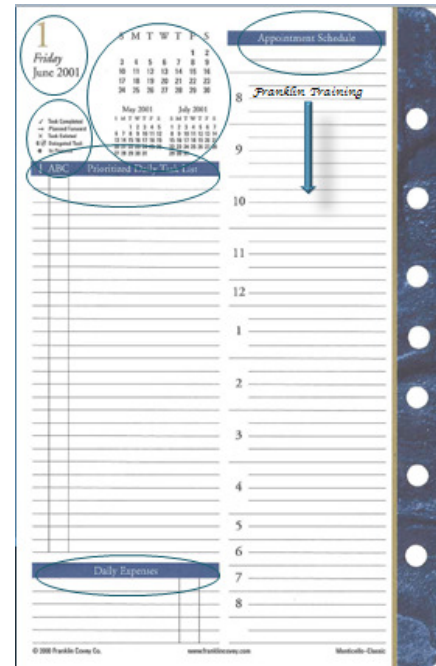
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Daily Task List and Appointment Schedule

This is where you record action items that you need to complete. These tasks are based on your personal and professional goals. Add items as necessary keeping in mind to focus on Q1 and Q2 activities.

Elements of the Daily Task List and Appointment Schedule page:

- The date
- Three month calendar view
- Appointment schedule
- Task list
- Legend of symbols
- Some designs include a daily expense list
- List tasks all appointments and update throughout the day
- Next prioritize your task list using the ABC method
 - ✓ A - priorities are must do tasks with high urgency and high importance
 - ✓ B – priorities are should do tasks with a lower importance but high urgency
 - ✓ C – priorities are low urgency and low importance
- Next decide the sequence of your prioritized tasks using the 123 method
 - ✓ A number sequence tells you the order of events



The most important tasks:

- Daily planning and solitude – This means time away to plan what is most important based on your goals 15 minutes a day is all that's needed.
- Weekly planning – Review your week by adding 10 minutes to your planning and solitude.
- Monthly planning – Make sure you stay productive by adding 15 minutes to your planning and solitude.
- Annual review and planning – Once a year turn the timer off and review your values, goals, and mission

Use the *Daily Task List Legend* to track you progress:

- The ✓ indicate a task is done
- An arrow says the task has been planned forward
- Use the ○ to delegate a task and the 1st initial of the person you delegate to
- The dot means in progress
- X means you no long intend to do this task

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Daily Notes

This is where you will capture everything that happens throughout each day

- ✓ The date is in the upper right corner
- ✓ The column on the left is for the entry number
- ✓ The middle column is for the entry details
- ✓ Use the right column to record the time of day the entry took place
- ✓ Or measure the duration of meetings or conversations
- ✓ Record notes and conversations throughout the day
- ✓ Number each entry
- ✓ At the end of each day review your daily note
- ✓ Forward any action items to a future daily task list
- ✓ All items must have a check mark by the number to indicate it has been reviewed and an action planned where needed
- ✓ Items that require action must be noted on a task list before marked as reviewed
- ✓ Remember you can use the right column to record event or conversation time and duration

Monthly Focus: Energy like the biblical gods of the mental and will conquer mountains. — Dave Ballin

Friday June 2001

Daily Record of Events

Entry Number	Entry Details	Time/Duration
✓ 1	Went to Franklin training. Looking forward to using the planner. Training was so awesome! I am definitely going to get the mist out of my planning from now on.	
✓ a.	Use this entry as an example	
✓ b.	Use letters to separate different notes for the same entry	
✓ 2	Use new numbers to separate different topics or events	
✓ 3	Spoke to Dave a Sir Speedy. Wants a quote on 10 kids of opaque offset. a. cheapest price b. Call back by Monday morning at 7:30	10:10 10:12 10:12

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At the end of each month

1. Review your goals
2. Review your daily notes pages
3. Index all entries that you think tell your story for the month
4. At the end of the second month of use remove the oldest month and put it in your 3 ring storage binder (this is the only time you will do this)
5. Insert the next month's calendar tab and filler pages into your planner
6. Remember after the initial 1st month of use, you will always have the previous month, current month and the next month calendar tabs and filler pages in your 7 ring binder

Rules for using your planner

- ✓ Follow the process you learned here for 21 days to form a productivity habit
- ✓ Take your binder with you where ever you go
- ✓ Use only one calendar for your planning
- ✓ Follow up on everything you record in your planner

Quiz

Based on the module, circle the correct answer:

1. To start improving your time management results you must understand where you spend your time.
 - a. True
 - b. False

2. Which Time Matrix "Quadrant" is incorrect:
 - a. Q1 activities are urgent and important
 - b. Q2 activities are urgent and very important
 - c. Q3 activities are urgent but not important
 - d. Q4 activities are not urgent and not important

3. How many minutes are in each day:
 - a. 1,001
 - b. 2,001
 - c. 1,221
 - d. 1,440

4. Identifying your values is an important part of time management:
 - a. True
 - b. False

5. When you don't have time to schedule all of the items from your monthly master task list:
 - a. Just forget about it until next month
 - b. At the end of the month plan ahead and put an arrow next to any unplanned items

6. How many days does it take to create a habit:
 - a. 30
 - b. 100
 - c. 21