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Learning without limits



Personal Effectiveness and Time Management

Trainer Guide

Materials Required:

- Delegate Notes – 1 printed copy per delegate
- Completion Certificates – personalise and print for each delegate
- 'Commit to Action' – 1 printed copy per delegate
- Tasks cards for 'What to do first' (Customer Service and Sales versions) (printed and cut - 1 set per pair)
- To-do list – 1 printed copy per delegate
- Projector/monitor
- Laptop/PC with sound card

Agenda:

Session Topic	Time
Introduction and What You Will Learn	5 mins
Time Management Challenges, Strengths and Weaknesses	10 mins
8 Steps to Effective Time Management	10 mins
The Pareto Principle (80:20 Rule) (AR)	10 mins
Rocks, Pebbles and Sand (AR)	10 mins
Prioritising (AR)	10 mins
What to do first activity	30 mins
Effective To-Do lists	10 mins
Procrastination	10 mins
Commit to Action	15 mins
Total Time	120 mins

(AR) = audio recording on slide – **N.B. second click animates slide to play audio**

Session One: Introduction and What You Will Learn

(Page 2, Slide 2) (5 minutes)

Introductions

Welcome the group, discuss timings, carry out any necessary introductions and the discuss topics being covered in this Boost Workshop.

What you will learn

At the end of this workshop, you will be able to:

- Identify how you manage yourself and your workload
- Understand the key principles of effective time management
- Identify key activities to allow you to achieve your goals
- Differentiating between urgent and important tasks and how to deal with conflicting priorities
- Creating to-do lists and daily plans to help regain control and reduce the need to fire fight
- Being proactive, staying one step ahead and reducing the need to fire fight
- Improve your self-discipline and avoid procrastination



Activity

Give participants a moment to write down their own learning objectives on page 2.



Explain that the back page can be used to record any notes and action they plan to take as a result of this Boost Workshop.

Session Two: Manage Yourself Not Your TIME

(Page 3, Slide 3) (10 minutes)

The idea of time management has been in existence for centuries, but it actually creates a false impression as none of us can actually manage time. It is uncontrollable; we all have the same 24 hours in a day but we can manage ourselves and how we use the hours we have at work.

Time management is actually self-management. Whether we are full-time or part-time and whatever our role - the ability to plan, prioritise, organise, and control the time we have available is vital if we are to be successful and proactive.



Activity

Ask the group to complete the activity on page 3 recording their time management challenges, strengths and weaknesses.

Ask each person to share their biggest time management challenge with the rest of the group.

Session Three: 8 Steps to Effective Time Management (Page 4, Slide 4) (10 minutes)

Here are 8 steps that we can all follow to improve how we manage the time we have available:

- 1) **Know goals and objectives** – you need to be clear about what is expected of you. If you are not sure of your goals and objectives, you need to find out by asking your line manager (Agent/Office Manager). For large, time-consuming tasks and goals it may be worth breaking them down into smaller daily/weekly activities.

For example, if you have a goal to contact all single line policy holders within 3 months, you may want to include this into a set number of daily outbound calls and set a yourself a goal 'to make 5 outbound calls every day'.

- 2) **Plan the day, week, month, year etc.** – spend some time at the beginning or end of each year, month, week and day planning what you are going to achieve and how you are going to do it. For some bigger goals, you may need support or training – so plan early.
- 3) **Monitor your progress** – it is important to review and monitor how you are getting on, especially with large, long-term goals. Take time to check your progress so you can take action if things are not going to plan and celebrate success when going well.
- 4) **Prioritise your tasks** – it is important that we do the right tasks first (rather than the ones that we prefer to do!). We will cover how to prioritise tasks shortly.
- 5) **Make best use of your time** – think about how your time is best utilised and what time of day you are most focused. Don't waste time on unimportant activities or getting involved in things best dealt with by others. Don't tackle really difficult tasks when your energy and concentration levels are low.

- 6) **Knowing when to say “No”** – we all want to be helpful but there are times when we have to say “No” (or “not yet”). If you are focused on a complex task or have lots of outstanding important tasks, you need to explain this to your colleague rather than just saying “Yes” and then not be able to complete everything or make mistakes.
- 7) **Organise yourself and your surroundings** – make sure your workspace and online systems are well organised. Clutter causes delays and distractions – so keep your workspace clear. Ask who has the untidiest desk in the office!
- 8) **Don’t procrastinate** - if something needs to be done, get on and do it. We all procrastinate and put things off at times but if something is important, try to get it done before it becomes urgent. If it is a task you don’t really like doing – try to get it done first thing. It is never as bad as you think and always feels good to get it done!

Models and Principles

Explain that we are now going to spend some time reviewing three time management models and principles that will help us better understand how to be more effective and proactive.

Session Four: The Pareto Principle (80:20 Rule) (Page 5, Slides 5-6 AR) (10 mins)

Explain to the group that you are now going to play a short audio clip explaining the 80:20 Principle.



Audio Clip & Activity

Play 80/20 audio and then ask group to answer the questions on page 5 and hold a short review discussion. Try to pick out a few good points that could be actioned immediately to generate benefits. What activities deliver the biggest benefits for the agency? *(Note: these might be tasks that they are directly responsible for but they could help by ensuring others have time to focus on these tasks)*

Session Five: Rocks, Pebbles and Sand (Page 6, Slides 7-11 AR) (10 mins)

Similar to the 80:20 Principle, the Rocks, Pebbles and Sand philosophy helps us understand what we do with our time and which activities are truly important.



Audio Clip and Activity

Play the Rocks, Pebbles and Sand audio and then ask group to complete the activity on page 6 and hold a short review discussion. How can we focus more time on the rocks and pebbles and minimise the amount of sand surrounding us?

Session Six: Prioritising (Page 7, Slides 12-14 AR) (10 mins)



Audio Clip & Activity

Play Prioritising audio from slide 13 - 14 and then complete the 'What to do first' card activity. Print and cut the relevant cards for your delegates.

The Customer Service tasks are indicated with  and the Sales tasks with 



Do not initially hand out the two 'unplanned task' cards.



Activity: 'What to do first!' (30 minutes)

Explain that for this activity we are working on the basis that everyone has 7 working hours available per day. Working in pairs you will be given a number of cards detailing tasks that you need to complete, but doing them all will take 14 hours! (Hold back the 'unplanned task' cards at this stage.) So which ones will you prioritise?

Ask the group to work in pairs and follow the steps below:

1. Review each card and the time needed to complete each task. (Note: Some tasks may not be totally relevant to certain individuals, but they should 'go with it!').
2. Now decide which task you are going to focus on in the 7 hours you have available today.
3. Create 2 piles – one for tasks you plan to complete today and one pile that can wait.
4. Now prioritise each pile with the most important/urgent tasks at the top.
5. Hold quick group discussion and compare results.
6. When everyone is happy that they have planned and prioritised their day effectively, explain that 'we have a problem!' Hand out the two 'unplanned task' cards from the relevant pack and ask each pair to re-prioritise their lists.
7. Hold a group discussion about the tasks and how often they have to deal with unplanned tasks.

Session Seven: Making Effective To-Do Lists

(Page 8, Slide 15) (10 mins)

Ask how many people in the room use To-Do or Task lists?

To-Do lists are essential if you're going to beat work overload. When you **don't** use them effectively, you'll appear unfocused and unreliable to the people around you.

There are many ways for us to create and manage our To-Do lists so whether you use good old pen and paper, post it notes, an electronic list or an app – any list is only good if the person creating it is committed to completing the tasks.

One of the biggest advantages to using a software-based approach to manage your list, is that you can update it easily. For example, instead of scratching off tasks and rewriting the list every day, electronic lists allow you to move and prioritise tasks quickly (mention MSD if relevant for this group).

Fun facts:

- 41% of to-do items were never completed.
- 50% of completed to-do items are done within a day.
- 18% of completed to-do items are done within an hour.
- 10% of completed to-do items are done within a minute (and should probably never appear on a To-Do list!).

When you **do** use them effectively, you'll be much better organized, and you'll be much more reliable. You'll experience less stress, safe in the knowledge that you haven't forgotten anything important. More than this, if you prioritise intelligently, you'll focus your time and energy on high-value activities, which will mean that you're more productive, and more valuable to your team.

Hand out printed to-do list to delegates for future reference. This can be emailed if delegates require a copy for their own use.

Step 1: Write your list

Write down all of the tasks that you need to complete. If they're large tasks, break out the first action step, and write this down with the larger task. (Ideally, tasks or action steps should take no longer than 1-2 hours to complete.)

Step 2: Prioritise each task

Run through these tasks allocating priorities – perhaps consider using a letter or numbering system such as A (very important, or very urgent) to F (unimportant, or not at all urgent).

If too many tasks have a high priority, run through the list again and demote the less important ones. Once you have done this, rewrite the list in priority order.

Step 3: Using Your To-Do List

To use your list, simply work your way through it in order, dealing with the A priority tasks first, then the B's, then the C's, and so on. As you complete tasks, tick them off or strike them through.

Step 4: Update your list

Many people find it helpful to spend 10-15 minutes at the end of the day, organising tasks on their list for the next day.

Mark the importance of the task next to it, with a priority from A (very important) to F (unimportant). Redraft the list into the order of importance. Then carry out the jobs at the top of the list first. These are the most important and most beneficial tasks to complete.

Session Eight: Procrastination (Page 9, Slide 16) (10 mins)

Show the Procrastination slide and discuss the Mark Twain quote:

"If it's your job to eat a frog, it's best to do it first thing in the morning. And if it's your job to eat two frogs, it's best to eat the biggest one first."

The frog is that one thing you have on your To-Do list that you have absolutely no motivation to do and that you're most likely to procrastinate about. Eating the frog means to just do it, otherwise the frog will eat you meaning that you'll end up procrastinating it the whole day.

Once that one task is done, the rest of the day will be an easier ride and you will get both momentum and a sense of accomplishment at the beginning of your day.

How do you spot the frog?

There are always some tasks we would like to tick off of our To-Do list as soon as possible, and that if accomplished, would help us feel better but are difficult or not very interesting.

We usually wait until the end of the day to tackle them, often realising we do not have any more time to do them today and pushing them on the To-Do list for the next day. This builds pressure and stress.

The frog is the **task you don't want to do, but need to do.**



Discussion Point

Ask the group to share a few examples of their 'frogs' and how to deal with them.



Activity

Ask the group to answer the questions/make notes to help them avoid procrastination on the bottom of page 9.

Boost Wrap-Up and 'Commit to Action'

(Page 10, Slide 17) (15 mins)

Take the last fifteen minutes for a quick review and to answer any questions the group may have.

- Hand out 'Commit to Action' sheets and ask each person to complete and hand back to you. Explain that these will be passed to the relevant line manager for follow up in a few days.
- Hand out personalised Completion Certificates that should be retained for CPD purposes.
- Remind and encourage them to create the Personal Action Plan on page 10 following this workshop.
- Thank the group and tell them to 'go eat some frogs'!