Operating on All Cylinders: Organizing Your Projects, Time, and Space for Optimal Results and Limited Stress

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http://go.osu.edu/OrganizingSTP
Objectives

By the end of this presentation, participants will:

1. Be able to identify their top 3 “space struggles”
2. Be able to identify their top 3 “time wasters”
3. Be presented with options to use as solutions for making their daily, weekly, monthly, and yearly time and physical work space become more effective and efficient
4. Be familiar with project management terminology, techniques, tools, and strategies
5. Be introduced to specific examples of applied project management
6. Receive resources to explore and apply organization and project management concepts
INTRODUCTION

Finding a balance between work responsibilities and workplace wellness is often lost behind the paperwork, emails, phone calls, time with clientele, and general business of Extension life.

Organization breeds success. However, Extension professionals are often hired for their content expertise, rather than their organizational competencies and project management skills.

Most Extension Professionals are very busy with a wide range of responsibilities to lead and execute numerous events, committees, and programs.
Look familiar?
What is Organizational Efficiency?

Most organizations assess their performance in terms of effectiveness. Their main focus is to achieve their mission, goals and vision. At the same time, there is plethora of organizations, which value their performance in terms of their efficiency, which relates to the optimal use of resources to achieve the desired output (Chavan, 2009).

In Extension, we care about both... but without efficiency, you rarely achieve effectiveness.

When you establish structure, you contribute to the establishment of an efficient workplace.
Why Should We Care?

Chan (2007), suggests that optimal prioritization of time and tasks leads to:

• More productive work relationships
• Better outcomes with fewer time-consuming mistakes
• Improved goal achievement
• Improved productivity
• Improved work/life balance, and
• Reduced stress and improved health
Why People Fail to Manage Projects Well

Poor project management stems primarily from a few key issues:

• Failure to clearly identify what is important
• Vague goals and expected outcomes
• Conflicting or unexpected needs and demands
• Poor communication
• Lack of resources
• Striving for perfection (not results)
• Failure to recognize and respond to change
• Failure to think creatively
• Lack of planning

Image Source: http://blog.bearing-consulting.com/2013/02/22/great-planning-disasters/
Activity Versus Action

Results from a 10-year study of over a dozen companies revealed that, “We often get into the habit of completing tasks one right after the other without considering if the tasks are important, urgent, or necessary (Bruch & Ghosal, 2000). Chan (2007) suggests that we often do not know the difference between ‘activity’ and ‘action’—[believing] that “…if we are busy [we] are being productive...” (pg. 17).

Cost/Benefit--- When does it become less useful?
Organizing, Prioritizing, and Managing our Time: What’s Holding You Back?

What Contributes to the Chaos?

Poor project and time management and failure to organize space stem primarily from a few key issues:

• Failure to clearly identify what is important – including planning, observing, prioritizing, and scheduling
• Poor communication
• Lack of appropriate resources and tools
• Lack of know how and systems
• Bad Habits
• Clutter
• Too Much Information (You’ve Got Mail)
• Other...

Lack of time is actually lack of priorities.
How Do We Get There?

Tips, Tricks, Products, and Apps!!!

We all know that we want optimal results with minimal stress but often are unsure of how to achieve this.

Fortunately, there are tools and strategies to help Extension professionals achieve organizational efficiency through the effective organizing of SPACE, TIME, and PROJECTS.
SPACE
ATTACK: The SPACE Formula

SORT
PURGE
ASSIGN A HOME
“CONTAINERIZE”
EQUALIZE

ATTACK: The PLACE Method

Purge
Like with like
Access
Contain
Evaluate

Source: Roth & Miles. (2001). Organizing for Dummies
ATTACK: Clear Your Desktop

The REMOVE Method

Reduce Distractions
Everyday Use
Move to the Preferred Side
Organize Together
View your Time
Empty the Center

Source: Roth & Miles. (2001). Organizing for Dummies
ATTACK: The File Piles

The WASTE Method

Is it WORTHWHILE?
Will I Use it AGAIN?
Can I easily find it SOMEWHERE else?
Will anything happen if I TOSS?
Do I need the ENTIRE system?

Source: Roth & Miles. (2001). Organizing for Dummies
ATTACK: The File Piles

Active Versus Inactive Files

Daily to monthly = Active ➔ In office and in close proximity
Quarterly or Less = Inactive ➔ Out of office or at storage unit

Match File’s Activity Level to Location

When to Clean Out Files

• At the close of a project
• When you are on hold on the phone
• 15 minutes a day
• An hour a week

Source: Roth & Miles. (2001). Organizing for Dummies
Space Problem: Paper Piles
Space Problem: Paper Piles
Space Problem: Filing
Space Problem:  Filing Tools: Eliminate vertical filing

File Immediately with Write on Labels

... or Print Quickly with a label printer linked to your computer
Managing Projects Tools
Managing Projects Tools
Space Problem: Notes
### Space Problem: Messages

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### Follow-up Format

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A messy desk means that work is in progress. Desk work is not happening while you are away from the office.
TIME

TIME WASTING
STRATEGIZE: Prioritizing Your Time

There are only so many hours in a day... How will you spend yours?

ANALYZE

• Making Time Tangible… where time meets paper
• Understanding your Unique Relationship to Time
• Sometimes Bad Habits Happen to Good People
STRATEGIZE: Understanding How you Spend Time

Time Mapping to Create Balance

• Commit to tracking your time for at least 2-3 full days
• Include interruptions, phone calls, drop-ins
• Track how many times you interrupt what you are doing to respond to texts and emails
• Pay attention to patterns of productiveness versus multi-tasking
• Include personal activities and events
• Don’t forget to include preparation and commutes
STRATEGIZE: Don’t be Busy, Be Productive!

“Being overwhelmed is often as unproductive as doing nothing, and is far more unpleasant. Being selective—doing less—is the path of the productive.”

“It’s easy get caught in a flood of minutiae, and the key to not feeling rushed is remembering that lack of time is actually lack of priorities.”

“To get the right things done, choosing what to ignore is as important as choosing where to focus.”

STRATEGIZE: Focus on the Necessary and Valuable

Pareto’s Law

- 80% of the outputs result from 20% of the inputs
- 80% of the consequences result from 20% of the causes
- 80% of the results come from 20% of the effort and time
- 80% of the company profits come from 20% of the products or customers

Ask yourself:

1) Which 20% of sources are causing 80% of my problems?
2) Which 20% of sources are resulting in 80% of my desired outcomes and happiness

Where should your focus be?
STRATEGIZE: Focus on the Necessary and Valuable

Parkinson’s Law

Parkinson’s Law dictates that a task will swell in (perceived) importance and complexity in relation to the time allotted for its completion.

The shorter deadline is almost inevitably of equal or higher value due to greater focus.

Two synergistic approaches:
1. Limit tasks to the important to shorten work time (80/20)
2. Shorten work time to limit tasks to the important (Parkinson’s Law)

STRATEGIZE: Define Goals and Activities

Defining Goals and Activities

The WADE Method

- **W**rite it Down
- **A**dd it Up
- **D**ecide (Prioritizing)
- **E**xecute

Time Tools: Identifying Goals and Maintaining Accountability

Post-It Sticky Board
*Use Post It’s to identify Teaching, Research, and Service Goals*

PlanetSafe Dry Erasable Customizable Planner
*Use Post It’s or Dry Erase Markers to identify Teaching, Research, and Service Goals by Theme*
STRATEGIZE: Plan

The PLAN Method

- **Prepare**
- **List**
- **Act** (with rhythms and routines)
- **Notice** (and reward)

STRATEGIZE: The Four D’s

If overwhelmed, elect to apply the 4 D’s:

• **Delete** (Ask yourself…who is making this request? Is it important?)
• **Delay** (Is it important and urgent or can it be done later?)
• **Delegate** (Am I the one who should be doing this? Am I the only one that knows how?)
• **Diminish** (Break into smaller task distributed over time)

STRATEGIZE: Learn to Say No

When asked to take on another task, PAUSE...
• Ask yourself, is this a priority?
• Determine if it must be done right now.
• Consider if has to be you that does it.

If the answers to the above question are no, then use the sandwich method for refusing gently but firmly..

E.g., “I really appreciate your confidence in me to do ***, however, I have other commitments right now that keep me from saying yes, please keep me in mind in the future.”
STRATEGIZE: Just Say No...

- Don’t answer calls from unrecognized numbers, let it go to voicemail
- Do not email first thing in morning or last thing at night
- Do not agree to meetings or calls with no clear agenda or end time
- Do not let people ramble
- Don’t not check email constantly (Batch and check at set times)
- Do not over communicate with low-profit/high-cost people (80/20 rule)
- Do not label everything as high priority (both urgent and important)
- Do not always have your cell phone on you or turned on
- Do not let work overshadow life
ATTACKING: To-Do Lists

- Decide what tool to use for your master list
- Check master list daily and identify priorities
- Place first things first (what’s most important/critical)
- Set realistic time frames
- Build in time for interruptions
- Never leave things on your to do list for more than 3 days without revisiting its value
- 3 day rule—Do it immediately, schedule it, let it go, or someday/maybe
- To get the right things done, choosing what to ignore is just as important
ATTACKING: To-Do Lists

Finding your focus in **18 minutes** a day---

5 minutes in the morning (Before you turn on computer--Plan)
1 minute per hour x 8 hours = 8 minutes (Step away from desk--Focus)
5 minutes at the end of the day (Turn off computer--Reflect and Rewrite)

Bregman, P. (2011). *18 Minutes: Find your focus, master distraction, and get the right things done.*

“If you really want to get something done, decide WHEN and WHERE you are going to do it.”

OHIO STATE UNIVERSITY EXTENSION

Time Tool: Calendar Management with a Paper Planner

Features: Birthdays & Anniversaries, Monthly Checklist, Notes, To Do Lists, Travel Log, Meal Planner, Account Register, Bills Chart, Gifts, Thank You’s and more!

<table>
<thead>
<tr>
<th>January</th>
<th>January</th>
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<tr>
<td><strong>Birthdays</strong></td>
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<td>10 AM 10</td>
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<td><strong>Monthly Checklist</strong></td>
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<td>- FACEBOOK</td>
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<td>- RELV</td>
<td>- TWITTER</td>
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<td>- Monthly Report</td>
<td>- Park Board</td>
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</tbody>
</table>

**Notes:**
- CLIP Inaugural Trip
- $20/Candidate - 2%
- Books: 1,3,4,5,6
Time Tools: Calendar Management with an App

iOS:
iCalendar

Android:
Business Calendar 2
Too Much to Do Tools

- Manage tasks from anywhere
- Get email, SMS, or IM reminders
- Share your tasks
- Access from your phone
- Manage tasks offline
- Use with Google Calendar
- Sync tasks from iGoogle

Life in Awesome Note
Time Tool: Spending too much time on one task (i.e., emails)

iOS: 30/30

Android: ClearFocus

Both apps lets you identify your daily tasks, and get notified to remember to take a break and switch tasks.
ATTACKING EMAIL and Other Communication Time Monsters

• Set Specific times and boundaries around email and other communications (e.g., only read and answer emails at certain times each day).
• Turn off notifications function for email and turn off text sounds
• Use this time to complete your important tasks before 11 am.
ATTACKING EMAIL and Other Communication Time Monsters

The RAPID Method

• **Read** (Triage and or Filter with Rules)
• **Attend** (Flag for optimal response time)
• **Pay** “or approve” (Bills or other critical actions)
• **Important** (Make time to respond or delegate)
• **Dump** (Delete if not necessary)
Too Much Information Tools

Welcome to OneNote
Your very own digital notebook.

Welcome to OneNote for iPhone
Take control over your next class or project. OneNote notebooks are designed.

Japan trip budget
Airline: 2 adults, 2 kids $2,840. Hotel: 7 nights $873. Rental car: 3 days $322...

Grandma’s cinnamon chocolate chip cake
Ingredients:

Syllabus for Biology
1. Artificial Selection
2. Mathematical Modeling
3. Hardy-Weinberg

Team Presentation
Scan, link ideas.

Premium Features
Places
Tags
Notebooks
All Notes

Evenly find anything you need

Flat White at Laynes Espresso.

Adam’s work list
Create badge in vector format. Organize my account. Education - Food - Design stuff - Fitness cards - Audio...
Additional Tips for Managing Time and Space:

- Slow down to speed up (Plan, prioritize, pause to reflect or think)
- Remember that life is a marathon, not a sprint
- Regular rest stops are good for your health and your mind
- Don’t negate, integrate (Schedule first things first and flex your world)
- Begin with the outcome in mind
- Find your focus
- Know what matters to you
- Get the right things done
- Decide what not to do
- Create an environment that compels you
- Say no convincingly
- Increase transition time— even schedule it
- Get over being a perfectionist
- Don’t put too much chocolate in your chocolate bar
- Stay flexible
Project Management Terminology

Extension professionals can benefit from understanding the concept of project management and learning what other industries have known for years...
What is Project Management?

Project management principles have been widely adopted by other busy professionals in numerous industries including construction, manufacturing, software development, sales, business management, healthcare and others to allow them to stay organized, focused, and highly productive.

Project management is the body of knowledge concerned with principles, techniques, and tools used in planning, control, monitoring, and review of projects (Business Dictionary.com n.d.).

Image Source: http://www.project-management-insights.com/project-needs/
Project Management Techniques: Defining the Project

- Goals and objectives
- Product scope
- Components
- Deliverables
- Schedule

Project Management Techniques: Key Functions

- Work Breakdown Structure
- Prioritization
- Preparation/Organization
- Assignments
- Timelines/Deadlines
- Monitoring Performance
- Accountability and Evaluation
Project Management Techniques: Defining the Skills

• Project design
• Estimating time and resources
• Determining and utilizing skills (self and others)
• Coordinating assignments
• Analyzing cost/benefit
• Tracking progress
• Communication
• Leadership
Planning for Project Management

Gaining a more organized view of the professionals’ day-to-day responsibilities, the project management approach enables users and collaborators to visualize and prioritize work that needs accomplished while also providing a clear view of work that has been completed.

- Identify projects for the year
- Develop calendar and identifying dates
- Identify repetitive tasks
- Develop timelines (time allotted to task)
- Create checklist
- Design standard operating procedures
- Create team strategy/delegated items interface
- Identify communication strategy
- Identify and implement tools
- Create team strategy / delegated items interface
- Process for accountability
Project Management Techniques

Managing Tasks:
• Checklists
• Software
• Apps
• Templates
• Calendars
• Timelines
• Gantt charts
Project Management Techniques

Developing SMART Goals and Objectives

SMART Goals

Interactive tool: Create your own SMART goals

SMART goals are Specific, Measurable, Attainable, Realistic, and Time-bound. They're like a text roadmap that makes it easy to pinpoint what you want and exactly when and how you plan to get it.

If creating SMART goals sounds like a lot of work, don't worry. SMART goals don't have to be long or complicated, and they don't take a lot of time to write. In fact, you can use this online form to create your own SMART goals. Answer the questions and short quizzes below, then click PRINT. Complete the process for each SMART goal you want. Your privacy is important to us, so AAHA's website won't save your responses. Be sure to press PRINT before starting a new form or your answers will be lost.

There are five easy steps:

1. Step 1: Write a specific goal statement.
2. Step 2: Define how you'll measure your progress.
3. Step 3: Time for a reality check. Is your goal attainable?
4. Step 4: Is your goal relevant?
5. Step 5: Is your goal time-bound?

BEGIN NOW

https://www.aaha.org/professional/resources/smart_goals.aspx#gsc.tab=0
Managing Projects Tools
Project Management Techniques

Manage the Work: Project Management Software

Smart Sheet
Project Management Techniques

Manage the Work: Project Management Software

Project Planning Pro

*Your Project, Task & Resource Management app*

Create project plans or import existing Microsoft Project plans and edit/update on the go.

Simple and easy to use tool to plan and manage any kind of project. It can be used for the simplest to the most complex project management.

The app provides flexibility to manage project plans during meetings or when out of office. It is designed to ensure complete project mobility.

Winner of Best App Ever Awards 2013 “Best Business App” - Runner-Up
Project Management Techniques

Manage the Work: Gantt Charts

http://teamgantt.com/
Doug’s Journey

| 104 | E-mail Julie Dull shooting sports training info |
| 105 | Register for Annual Conference |
| 106 | Make hotel arrangements for annual conference |
| 107 | Send Melinda an e-mail to request permission to travel overnight for Animal Science / 4-H Professionals In-Services and for Annual Conference |
| 108 | **MXC - Making Extreme Camp Counselors Workshop** |
| 109 | Create a slide to show at November 4-H Professionals In-Service – send to Kathy Blackford |

The Ohio State University
College of Food, Agricultural, and Environmental Sciences
Project Management Techniques
Activity #4 (5 Min) – Project Management

Identify Your Projects
Go forth
and be productive!!!
http://go.osu.edu/OrganizingSTP