REPRODUCIBLE TRAINING LIBRARY
Customizable Soft-Skills Courseware

Time Management

Instructor Guide

Instructional design and learning philosophy

We are committed to providing the best core-skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience

- Library research

- Online research

- Customer research (focus groups, surveys, etc.)

- Subject Matter Experts (SME)

- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:

- Learning objectives — effective tools for managing, monitoring and evaluating training

- Meaningfulness — connects the topic to the students' past, present, and future

- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn

- Modeling techniques — demonstrate to students how to act and solve problems

- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation

- Consistency — creates consistent instructions and design to help students learn and retain new information

- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions, and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Trainer information

Materials needed

◊ Flip chart
◊ Markers
◊ Sticky notes
◊ Pitcher of water
◊ Styrofoam cup
◊ Sharp pencil
◊ Bowl
◊ Copy of desk blueprint for each participant
◊ Copy of "Saying 'no' to the boss" scenarios for each participant
◊ Copy of "Understanding procrastination" worksheet for each participant

Personality style

The "time management" personality styles in this program are based on Tracom's Social Styles Instrument.

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Course objectives

◊ Define various approaches to time management.

◊ Understand the relationship between time management style and personality preferences.

◊ Select your personal preferences for working efficiently.

◊ Assess your time management style.

◊ Outline traditional time management steps.

◊ Acknowledge when traditional time management works well.

◊ Identify when traditional time management does not work well.

◊ Recognize the causes of procrastination.

◊ Implement tips to overcome procrastination.

◊ Use a four-step strategy to make to-do lists manageable.

◊ Initiate one of three options to handle incoming paper.

◊ Analyze the reasons clutter accumulates.

◊ Clear out clutter and organize your workspace.

◊ Apply time-saving techniques.

◊ Determine when tasks can be automated.

◊ Utilize the priority matrix.

◊ Identify the priorities and boundaries of your job.

◊ Designate the priorities of a balanced life.

◊ Blend the strengths of the four time management styles to customize your own mix of efficiency and comfort.

Chapter **One**

A PERSONALIZED APPROACH TO TIME MANAGEMENT

Personality and time management style

A simple glance at the desks of various workers reveals different organizational and time management practices that individuals have adapted to their personality.

Personality preferences have an impact on how individuals successfully manage their time. For instance, a person who works best with high levels of change, challenge, and flexibility will not do well to use highly structured time management techniques. While a person who works best with details, stability, and status quo will thrive with a structured approach to time management. Both approaches are equally effective and neither approach is better than the other.

Using personality assessments

An assessment can be used to identify personality preferences. Personality assessments have been used in the United States for more than forty years and most are self-assessment—meaning individuals select the answer they feel best describes them.

There are several personality assessments available. Tracom's Social Styles is a personality assessment tool that will be referred to in this training.

Time management styles

One way does not work for everyone.
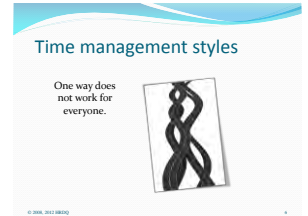
These differences are evident in the workplace. Some people appear to be scattered and disorganized yet always meet their deadlines, while others get so caught up in tending to immediate needs that the project work never gets done. These differences can be attributed to different personality preferences.

Be very clear that the type of personality assessment referenced here is examining a person's preference for things such as how information is gathered, how decisions are made, or where energy is directed—not assessing a person's state of mental health.

Tell the class they will take a brief personality assessment in the next chapter that examines their time management personality style.

Chapter **Two**

YOUR TIME MANAGEMENT STYLE

Assessing time management style

Personality preferences affect how we interact with other people, how we take in information, how we make decisions, and how we approach life. Work styles also vary based on personality traits. Time management is no different. The same techniques simply do not work for everyone.

Put a check mark next to the questions you answer yes to in the following four sections.

Section A	Section B
❑ Do you have difficulty saying "no" to people?	❑ Are you pre-wired for using time efficiently?
❑ Are you worried about offending people if you tell them you don't have time?	❑ Are you usually right (or very close) when estimating the amount of time something will take?
❑ Do you tend to give others as much time as they need?	❑ Is it difficult for you to relax?
❑ When estimating the length of time a project will take, do you consistently underestimate?	❑ Do you despise waiting?
	❑ Are you appalled when people do not meet deadlines?
❑ Do you consistently plan to do too much in a day?	❑ Can you say "no" when you don't have time?
❑ Do you put the needs of others before your own?	❑ Does it bother you to drop what you are doing to deal with something else?
❑ Do you run late between meetings, because you spend time "wrapping it up" with others one-on-one?	❑ Do you complete tasks more quickly than others?
Section A Total:	**Section B Total:**

Facilitate a discussion about which of these four styles would be the best traditional time manager.

Of the four styles, only the Analyticals have natural preferences to work in a way that is congruent with traditional time management. This means that for three-fourths of the population, the time management techniques typically espoused DON'T WORK!!

Typical perceptions and traits of people using the different approaches are outlined in the table.

Amiables
Perceptions vs. Misperceptions

Analyticals
Perceptions vs. Misperceptions

Drivers
Perceptions vs. Misperceptions

Expressives
Perceptions vs. Misperceptions
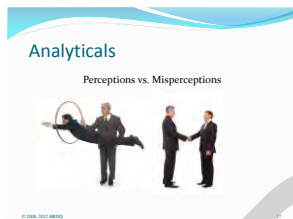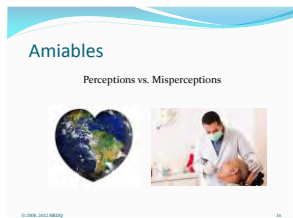
Perceptions and misperceptions

People tend to believe that their way of time management is the right way.

Amiables	Analyticals
Nonlinear	Linear and sequential
Intuitive based on values	Focused
Big picture	Specialist
Many concepts tie together	One thing at a time
Multi-task	Like hard facts and data
Expands, makes many from one	Seek the one correct answer
Comfortable with uncertainty	Work step-by-step
Trust gut-level instincts	Methodical
Seek many reasons or answers	Narrow many down to one
Generalist	Plan for doing, action
Unstructured	Focus on key items
May be perceived as "scattered"	Can be seen as "narrow-minded"
Drivers	**Expressives**
Respond to immediate needs	Logical
Neglect completion of long-term projects	Nonlinear
Jump from task to task	Big picture
Leave tasks unfinished if interrupted	Many ideas and facts
Action-oriented	Multi-task
Sequential within tasks	Intuitive based on logic
One thing at a time	Expands, makes many from one
May be seen as "shooting from the hip"	Comfortable with unknown
	Seek many explanations/answers
	May be seen as "flaky"

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Understanding procrastination

Procrastinators worry about the things they are putting off and not getting done. If you are not worried about it, you're not procrastinating. Typically, procrastination is a fear of some kind which is holding back progress.

There are many reasons people procrastinate. The most common are:

◊ **Avoiding unpleasant tasks** — procrastination in its purest form is delaying the completion of tasks that are undesirable or difficult.

◊ **Poor memory** — forgetfulness of tasks to be completed. This is caused by poor organization skills or too much to do.

◊ **Priorities are out of order** — misappropriation of time. Spending time on something that is not the top priority and leaving the most important items undone.

◊ **Lack of organization** — disorganization is a common cause of procrastination. To start the task or project would require a separate project of getting organized first. This makes the other tasks seem all the more difficult to get done.

◊ **Passive-aggressive behavior** — a common passive-aggressive tactic is to simply *not* do what another person needs done. In this case, the procrastinator mistakenly thinks he or she can lash out against the other person by holding up their work. This unhealthy behavior needs to be addressed directly and consistently, with clear ramifications that are acted upon.

◊ **Unwilling to take risks** — viewing the necessary steps to complete a task as too risky or scary can cause tasks to go undone.

◊ **Fear of failure** — concern about not being capable of doing a task.

◊ **Perfectionism** — the desire to have everything be perfect can keep people from doing necessary tasks. It's important to accept that most things are imperfect.
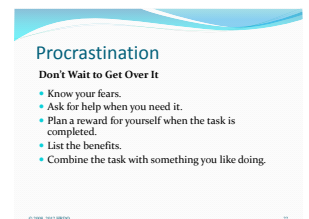
Choose a partner and begin a discussion about procrastination. Tell your partner what types of things you put off doing. Discuss why you procrastinate when given these tasks in particular. Finally, discuss what you are worried about.

Discuss the most common reasons for procrastination.

Hand out worksheet found in appendix. Have participants work with a partner to identify what types of things they put off doing and why they procrastinate when given certain tasks. Ask them to review the most common reasons for procrastination and try to recognize, discuss, and write down what they are worried about when they procrastinate on tasks or projects.
When people have finished their discussions have them share some of their ideas with the group.
 Ask: "What would help you stop procrastinating on completing these tasks?" Write these ideas on a flipchart. Ask the group to write down on their own chart ideas that would help with certain tasks.

Procrastination
Don't Wait to Get Over It
• Know your fears.
• Ask for help when you need it.
• Plan a reward for yourself when the task is completed.
• List the benefits.
• Combine the task with something you like doing.

Setting boundaries

Saying "no"

It is not humanly feasible to do everything that is asked of us. Setting limits and saying no to some requests is necessary. When you say no, keep these ideas in mind.

◊ You are not responsible for pleasing everyone.
◊ Develop the respect of your peers for knowing your limits.
◊ Express your priorities.
◊ Know when to quit.
◊ Do not always say no; save it for when you really need to say it.
◊ Let go of control and let others do their work.
◊ Realize you do not need the approval of others.
◊ Establish the expectations of the task before saying yes or no.
◊ Keep a list of the things you will do when you have extra time.

Saying "no" to the boss

It is difficult to tell your boss no, but there are times when it is necessary—when you cannot possibly accomplish what they ask of you. The best approach is to view "saying no" as a negotiation process. You need to present your manager with the projects you are currently working on and what your focus is. Ask for their input on priority, delegating, or delaying current tasks to take on the new assignment. The key is to maintain open, direct, and honest communication.

Use this approach.

◊ Remind them of the status of current assignments and review how the new request will affect them.
◊ Estimate a time frame for the task, if you accept it.
◊ Ask the boss to prioritize the new and existing projects.
◊ Keep a positive attitude.

Example: Your manager asks you to take on a new project. If this overloads your time, say, "I'll gladly work on that. It will mean pushing out the deadline on the Powell project two weeks. Is that the priority you would like on these projects?" Engage in a discussion with your manager about priorities and deadlines.

Hand out the "Saying 'no' to the boss" scenarios found in the appendix and on the flashcards. It's OK if some groups receive the same scenario.
Using these scenarios, have participants work with a partner and practice saying no to the boss. After completing this practice session, ask them to consider what they did well and what they need to improve.

Debrief. Ask participants, "What is your greatest fear of saying NO to the boss?"

Many people really respect boundary setters and as a result, *use* people who always say yes.

Managing interruptions

Interruptions are inevitable; they are part of how the work world operates. Plan on them happening daily and have a response prepared. Time is wasted each time we have to re-orient ourselves to our work after allowing ourselves to be interrupted. Determining acceptable and unacceptable interruptions is crucial.

Speaking up

If you let others know they are interrupting you, they will typically respect your need to complete work. Be friendly, yet assertive.

Set up meetings with people who interrupt you on a regular basis. When they interrupt say, "I'd be glad to talk about that. Let's add it to the list for our meeting tomorrow."

Hiding out

When you need to work without interruption, find a quiet spot where you will not be easily found. Work in this space and if people do find you, tell them you are working there because you really need to get some work done, but will catch up with them later.

Using the telephone

◊ Forward your phone to voice mail for a few hours daily.
◊ Return calls at designated times of day.
◊ Leave complete messages for others.
◊ Answer questions by leaving a voice mail message vs. asking the person to call you back.
◊ Wrap up calls when the purpose is achieved.

We have developed into a "microwave society"—where everyone wants the fastest service and expects immediate results. We don't want to wait for oven-baked cookies, but settle instead for microwave baked cookies.

Say, "I don't have much time right now. What is it you wanted to talk about?" or "I'm really jammed to get this proposal out the door. Can I catch up with you in the morning?"

Try speaking with your manager about working at home one day a week. This will greatly minimize interruptions.

Frequent interrupters
• Plan on spending time with them.
• Train them to keep a list of items to talk to you about instead of interrupting.
• Reinforce this each time they interrupt.

Waste time, want time

Socializing with your coworkers is an important part of your organizations culture. Every organization wants balanced employees that can successfully juggle work, family, and community. But if you find yourself wanting more time in your day, you may want to evaluate how much time you are wasting in personal agendas.

◊ Three hours spent polishing an internal memo

◊ One hour spent debating the retirement present of a colleague

◊ Three minutes spent organizing your outbox

◊ Five minutes spent talking about sports events

◊ Thirty minutes spent talking about your vacation

◊ Twenty-five minutes talking about an upcoming phone call with a tricky client

◊ Twenty minutes organizing your e-mails after vacation

◊ Twenty minutes talking with your partner about your dinner plans

Worthwhile	Wasted

Energy builders

Lifestyle choices

How you live your life determines your energy level. Many choices that we make on an ongoing basis have tremendous impact on how we feel throughout the day as well as over time. The list below includes factors that can add to or subtract from your energy level.

◊ Amount of sleep
◊ Nutrition
◊ Exercise
◊ Learning
◊ Fun and play
◊ Hobbies and interests
◊ Quality time with family and friends
◊ Vacations or long weekends
◊ Sense of purpose
◊ Love and intimacy

Which of the above factors do you spend adequate time on regularly?

_____

_____

_____

_____

What can you do to increase the level of the other factors in your life?

_____

_____

_____

_____

Course review

1. What are the three nontraditional time management styles?

   _____

   _____

   _____

   _____

2. Which time management style will work best with highly complex projects?

   a. Analytical
   b. Driver
   c. Expressive
   d. Free Wheeler
   e. Counselor

3. Analyticals enjoy spontaneity and are most likely to respond to immediate needs.

   ❏ True   ❏ False

4. What are the four steps in traditional time management?

   _____

   _____

   _____

   _____

5. Drivers are seen as (select all that apply):

   a. Spontaneous
   b. Intuitive
   c. Organized
   d. Flexible
   e. Good troubleshooters
   f. Task masters
   g. Touchy-feely

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President
R.C. Rulka Consulting, LLC

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