McAndersen

TIME MANAGEMENT

[Document subtitle]

ABSTRACT

“Time management” is the **process of organizing and planning how to divide your time between specific activities**. Good time management enables you to work smarter – not harder – so that you get more done in less time, even when time is tight and pressures are high.The answer lies in good time management.

SELF-STUDY GUIDE

Career Development Series

Time Management

Table of Contents

Session One: Course Overview **1**

Course Overview 1

Learning Objectives 1

Pre-Assignment 3

Pre-Course Assessment 4

Session Two: What Is Time Management? **6**

Pre-Assignment Review 6

Why Time Management Is Important 7

Session Three: Setting Goals **9**

Goals and Targets 9

Setting SMART Goals 9

Your Own SMART Goals 11

Session Four: Planning Tips and Tricks **12**

Planning Tools 12

Case Study 14

Case Study Questions 16

Session Five: Setting Priorities **18**

Prioritizing Your Tasks 18

Your To-Do List 21

Managing Interruptions and Distractions 23

Tips for Controlling Disruptions 23

Session Six: Making Decisions **25**

Eight Ingredients for Good Decision Making 25
Weighing the Pros and Cons 26
Session Seven: Delegating 28
Assigning Tasks 28
Guidelines for Success 29
Case Study: What Should Sheila Do? 31
Session Eight: Scheduling 33
Organize Your Time 33
Creating a Schedule 35
Session Nine: Putting an End to Procrastination 36
Eating the Frog 36
Session Ten: Creating Order 38
Decluttering 38
Making Connections 40
Organizing Your Work Area and Your Paperwork 40
Guidelines for Keeping a Piece of Paper 42
Session Eleven: Organizing Your Files 43
Sorting Based on File Type 43
File Categories 43
Electronic Files 45
The Batching Technique 46
Session Twelve: Managing Your Workload 47
Managing Email 47
Case Study: Mary Marvelous 49
Workload Analysis 51

Personal Action Plan **56**

Course Summary **58**

Recommended Reading List **59**

Post-Course Assessment **60**

Pre- and Post-Course Assessment Answer Key .... Error! Bookmark not defined.

Pre-Course Assessment .... **Error! Bookmark not defined.**

Post-Course Assessment .... **Error! Bookmark not defined.**

Assignment Answer Keys .... Error! Bookmark not defined.

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Session Three: Setting Goals .... **Error! Bookmark not defined.**

Session Four: Planning Tips and Tricks .... **Error! Bookmark not defined.**

Session Seven: Delegating .... **Error! Bookmark not defined.**

Session Ten: Creating Order .... **Error! Bookmark not defined.**

Session Twelve: Managing Your Workload .... **Error! Bookmark not defined.**

How to Use This Guide

This Self-Study Guide is designed and laid out in a way that will guide student learning much in the same way that an instructor would. This workbook is comprised of modules called Sessions. Each Session focuses on a major concept in the course.

In each Session, we have included short-answer and (in some instances) multiple choice questions which relate directly to the session material. Throughout the guide, you can take the opportunity to internalize what you have learned by completing various self-reflect on exercises.

SESSION ONE: COURSE OVERVIEW

COURSE OVERVIEW

Time is money, the saying goes, and lots of it gets lost in disorganization and disruption. We also deal with a constant barrage of technology, people, and tasks that can contribute to that disorganization. Many people find that they flit from one task to another, trying to get everything done, but often falling short.

Today you will learn how to make the most of your time by getting a grip on your workflow and office space, using your planner effectively, and delegating some of your work to other people.

LEARNING OBJECTIVES

After you complete this course, you will be able to:

- Better organize yourself and your workspace for peak efficiency.
- Understand the importance of, and the most useful techniques for, setting and achieving goals.
- Plan and schedule your time efficiently.
- Learn how to set priorities.
- Discover the ingredients for good decision-making.
- Learn what to delegate and how to delegate well.
- Take control of things that can derail your workplace productivity.
- Create order and get organized.
- Manage your workload.

Why did you take this course? Use this opportunity to consider your personal learning objectives and reasons for taking this course.

PRE-ASSIGNMENT

Please answer the following questions.

What do you believe are your top three priorities/objectives in your position?

What do you believe are the top three obstacles to working on your priorities or meeting your objectives at the moment?

On a scale of 1-10, how would you rate your organizational skills right now? ________

What are the top three things you think you must do in order to be more organized?

What would you do with any additional time if you found a way to give it to yourself?

SESSION TWO: WHAT IS TIME MANAGEMENT?

In this session, you will learn why time management is important, and review the Pre-Assignment that you completed before starting the course.

PRE-ASSIGNMENT REVIEW

What do you believe are your typical strategies for managing your work and your time? Most of us try one of the following techniques when we get snowed under:

- Work harder
- Work faster
- Get organized

We all have the power of choice. Your organizational style is a result of the choices you make on a minute-by-minute basis.

Can you give some examples of how choice affects the way you work?

What is the one activity that you know if you did superbly well and consistently would have significant positive results in your personal life or your career?

If you know these things would make such a significant difference, why are you not doing them now?

WHY TIME MANAGEMENT IS IMPORTANT

Time management refers to making the best use of one's time through dealing with time effectively so that the right time is allocated to the right activity.

Effective time management allows individuals to assign specific time slots to activities, according to their importance. This means determining which work should be done earlier and which can be done later.

Time management concerns developing processes and tools that increase efficiency and productivity, which in turn improves the bottom line.

Managing time involves:

- Setting goals and objectives
- Planning

- Setting priorities and deadlines
- Making decisions
- Delegating
- Scheduling

We will look at these six principles of time management throughout the course.

SESSION THREE: SETTING GOALS

Read any self-improvement book and you will learn that hard work, focused goals, and persistence are important to achieving your objectives. Goals or targets are also an important part of managing your time.

In this session, you will learn why setting goals is important. We will also introduce you to the SMART acronym, which can help you set solid goals that you are motivated to reach. You will then have an opportunity to set a goal for yourself to accomplish after the course.

GOALS AND TARGETS

Most of us cannot hit a target if we cannot see it. Before you can develop plans, you have to know what you want to accomplish (your goals or targets); how you want to accomplish those goals or targets; what resources of time, money, and materials you have; and who will carry out the implementation. So set some targets for yourself, targets that you can see, and we will start the journey to reaching them.

Many of us are full of ideas but short on taking constructive action to put those ideas into play. Maybe we try something once and then meet failure because we did not think and plan the actions through. But you know what they say about the lottery: “You cannot win if you do not buy a ticket.” Well, the same is true in life: if you stop trying, you lose all chance of succeeding. Make a pact with yourself that you will make an effort to put into practice the things we talk about today that will be of the most benefit to YOU. And to make that pact even more of a commitment, share it with a colleague, your spouse, or your supervisor so they can help you achieve your goal.

SETTING SMART GOALS

Goals and objectives are the basis for planning. As the Cheshire Cat said to Alice, “If you don't know where you are going, then any road will take you there.” And that is often how we approach life. We just live, and if we end up where we want to be, hey, that is great. If we end up where we do not want to be, hey, that is life.

We can do a bit better than that, if we really want to. The first element in planning is knowing what we want to achieve, and the way we word our goals is the biggest factor in helping us achieve them. To help you create good goals, remember the SMART acronym.

A **SMART** goal is **S**pecific, **M**easurable, **A**ttainable, **R**elevant and **T**ime-framed.

Specific

- A SMART goal describes a specific, observable action or behavior using action verbs and defines "what has to be done?"
- Does it relate to my job?
- What am I going to achieve as a result of this target?
- Does it relate to the departmental plan?
- Does it clearly define the function to be performed?

Measurable

- Outcomes or end results in qualitative or quantitative terms.
- Can the result be easily defined or measured?
- How can I check/observe progress and verify outcomes?
- Can the limits and parameters of the goal be defined?
- How will I know when the target is met?

Attainable

- Goals are within reach – both realistic and reasonable given the required skills and resources are provided.
- How difficult will it be to achieve this goal?
- What would prevent this goal from being achieved?
- Is it realistic in terms of my knowledge, experience and skills and/or what resources will I need to achieve the goal?
- Is it within my control?

Relevant

- A SMART goal is relevant to individual responsibilities, departmental goals and the strategic direction of the organization.
- Does this goal make sense considering my job description and daily responsibilities?
- Does this goal address the needs of the organization?

- Why is this goal important to the organization?

Time-framed
- SMART goals have specific target dates, frequencies or deadlines.
- Is there an end date, deadline, and/or milestone for the result?
- How long will it take to achieve this goal?
- Are there progress review check points?

YOUR OWN SMART GOALS

Think about your goals and what you want. Write down a couple of SMART goals below that you can use in your own Personal Action Plan and get started on right away.

SESSION FOUR: PLANNING TIPS AND TRICKS

Life is much easier when there is a plan, and it is put into action. Having a plan gives us a place to start, and helps us remember what we are supposed to be doing at any given time.

In this session, we will share some of the strategies that we have found most useful for efficient planning and organization. As you work through this information, remember that we recommend choosing one or two tactics that you think will work for you and trying those out, rather than trying to implement a whole host of changes.

PLANNING TOOLS

Guidelines for Efficient Planning

Life is much easier when there is a plan, and it is put into action. Having a plan gives us a place to start, and helps us remember what we are supposed to be doing at any given time.

Here are some guidelines for efficient planning:

- Did you know that you can save yourself an hour each day just by **getting organized**? When you arrive at work or return home, take a moment to put your coat and keys where they belong. Put papers where you can put your hand on them quickly.
- Use your **workspace and personal space** (home, vehicle, garage, etc.) to their greatest advantage. 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 will help you to get things done in the short term, which contributes to achieving long-term objectives.
- An **up-to-date master calendar** can be your most helpful planning tool. If you prefer an electronic version, make sure that it is backed up properly so that you do not lose your data.

- When things begin to get hectic, a "**Things to do Today**" list helps focus attention on the highest priority items.
- **Action planning worksheets, milestone charts, and PERT diagrams** (the types of diagrams used in project management) are excellent planning aids when properly used.
- **Planning contact** with colleagues and staff will help minimize disruptions. Keep a file for each person you meet with on a regular basis, with items to be discussed highlighted for easy reference.
- The most effective approaches to planning are those **tailored** to meet individual needs. Concepts, procedures, and worksheets should be modified to fit individual circumstances.
- Experts say nothing should be attempted without prior planning, although applying **flexibility** is also important.

A Planning Checklist

For every plan you make, cover all these points:

- What
- Where
- When
- How
- Who

Putting Plans into Action with Scheduling Tools

Some useful short-term planning tools:

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

CASE STUDY

Please read the case study about Riley and his problems with time management. Then, answer the questions to help Riley get control over his workload.

Case Study: Riley's Predicament

Riley Nash arrived at work early on Monday morning. He spent some time on the weekend getting caught up on paperwork and to get organized for the week. It seemed like there were never enough hours in the day to get everything done!

This week, he had the following projects to complete:

- File three data reports for last week, which would take him about three hours.
- Complete and file 12 data reports for this week, which would take about six hours.
- Enter data for 20 new customers, which would take about 10 hours.
- Think of goals he wanted to accomplish in the next quarter, which would take about an hour.

He sat at his desk, turned on his computer, and opened his email. There were 14 new messages. He sifted through them and saw a notice about a conference coming up in an exotic country. Even though he knew he would not be attending, he read the article and did some research on the location. How nice it would be to take a break, he thought!

His daydreams were interrupted by the sounds of other people arriving. He would spend over an hour and a half looking at his email! He quickly closed the web surfing windows and started filing the data reports he had done on the weekend. As he was doing this, he realized he had not completely filled out a few parts of one of the reports. He set those to one side of his desk and started opening the files with the information that he would need.

Just as he was finishing that, his manager Sharon walked in with a stack of papers. "Riley, I need some numbers for a meeting at 1 p.m.," she said. "Could you go through this information for me and email me a summary?"

"Sure thing! I will get right on it," Riley promised. He set the files with the form information aside and took the papers from her. He started flipping through them and realized he had not yet had his morning coffee. He set the papers aside, got up, and went to the break room.

There, he met Steve and Luke, who were chatting about their weekend trip to a football game. Riley listened enviously, thinking of the sunny weekend and the time he had spent in his home office working on paperwork. That reminded him of the task that Sharon had assigned him; it was already 10:30 a.m. and he had not even started the report!

As he was walking back to his office, Sumar from the accounting team ran up to him. “Riley, could you join me in a brief meeting?” he asked. “We have some questions about the paperwork that you submitted last week for the Flextronics account.”

Riley quickly finished the last of his coffee, grabbed the files from his office, and joined Sumar and the team in the boardroom. It turned out that he had missed some key information in last week’s reports, too! By the time they sorted out the problem and Riley found the right information, it was 12:30.

As Riley was leaving the meeting to go back to his office, Sharon walked by. “Do you have those figures for me yet?” she asked. “I am heading into the meeting in half an hour and I have not seen them yet.”

Riley replied, “Oh sure, they are done. The system must have eaten the email. I will send it right away once I get back to my office.”

He raced back to his office, looked at the page that outlined what Sharon needed, and immediately started to panic. He would need at least two hours to go through all the information and he only had about 25 minutes! He quickly skimmed the data and put together what he could. He pushed Send on the report at 12:59 and hoped that he gotten everything right.

It was well past lunchtime, so he went to the cafeteria to grab a sandwich. He walked in just as they were singing “Happy Birthday” to one of his colleagues. He felt compelled to stay and have cake and pizza with his friends. It was 2:30 before he managed to escape.

When he walked into his office, Sharon was waiting for him. “Riley, I am really disappointed in that report you prepared for me,” she said. “I did not receive it until right before the meeting, which meant I had no time to review it. Once I started presenting it, I realized how much information was missing and wrong. I had to stop the presentation, apologize, and reschedule the meeting for tomorrow morning. It was a huge waste of time for everyone and really embarrassing for me.”

Riley was horrified. “I am really sorry, Sharon,” he said. “Sumar pulled me into a meeting this morning and I got sidetracked. I will re-do the figures for you this afternoon.”

“That would be great,” Sharon said. “Please have them to me by the end of the day so that I can review them in the morning before the meeting.”

As soon as Sharon left, Riley started working on the report for her. It took far longer than he expected. Between finishing the report, dealing with a number of emails, and fending off more interruptions, it was after 6 p.m. before he left the office. He had worked 11 hours that day and had gotten nothing accomplished! He wondered how other people had time for themselves in the evenings and on weekends.

CASE STUDY QUESTIONS

How did Riley make good use of his time?

How could Riley have made better use of his time?

If Riley could do today over again, what kind of schedule would you recommend?

SESSION FIVE: SETTING PRIORITIES

Once you have mastered setting goals and you know strategies for planning, the next step is to learn how to set priorities.

In this session, you will review the Urgent-Important Matrix, and learn how to manage interruptions and distractions.

PRIORITIZING YOUR TASKS

The Urgent-Important Matrix

Former United States President Dwight Eisenhower once said, “What is important is seldom urgent and what is urgent is seldom important.” He based his time management around this idea. Other personal productivity experts, including Stephen Covey and Laura Stack, have brought this idea into the mainstream in recent years.

Eisenhower’s matrix is pictured on the next page. It can help us determine what is urgent, what is important, and most importantly, how we should be spending our time.

- **Important** is defined as an activity that will help you complete your goals.
- **Urgent** is defined as something that has a deadline attached to it.

Matrix Overview

	URGENT	NON-URGENT
IMPORTANT	**Quadrant 1: Crises** • Time-sensitive items • Firefighting • Deadlines • Important meetings • Payroll, taxes, legal items that cannot wait	**Quadrant 2: Big Picture** • Weekly review • Planning/goal setting • Crisis prevention • Mentoring/coaching • Productive daydreaming
NOT IMPORTANT	**Quadrant 3: Interruptions** • Junk mail • Misdirected phone calls • Drop-in visitors • Unnecessary meetings	**Quadrant 4: Distractions** • Chatting/socializing • Surfing the Internet • Busywork • Procrastination • Unproductive daydreaming

Quadrant 1: Urgent and Important

These are the things that need to get done NOW. This is the payroll deadline, dealing with an upset client, and completing your income tax return. Ignoring these items will result in major disasters.

This is where many people find that their time gets eaten up. “I cannot control when clients get upset!” you might say. “Dealing with an interruption like that always throws my day off kilter.”

You are certainly right about one thing: these situations often cannot be controlled. However, their frequency and impact can often be reduced by employing activities in Quadrant 2.

Quadrant 2: Important but Not Urgent

These are the big-picture items: the things that may not have a deadline but are crucial to your long-term success. This is where weekly review, goal setting, and information management fits in. Time spent here is invested in yourself, in others, and in the future. Activities here should diminish the number of Quadrant 1 items, reducing stress, minimizing crises, and making you feel more in control.

Quadrant 3: Urgent but Not Important

These are the time-wasters that can suck the life out of anyone's day. Unnecessary meetings, drop-in visitors, improperly delegated projects, and pointless reports all fall into this category.

There are a few ways to manage interruptions. We do not recommend an open-door policy – it is just too disruptive. But locking yourself in your office like a hermit can result in small problems spiraling out of control. Instead of one of these all-or-nothing approaches, think about using one of these techniques in your office.

Set Office Hours
Set aside specific hours in the day when your door will be open, like professors do. Make exceptions for emergencies.

Institute a Quiet Time Policy
Some organizations have successfully instituted a timeframe where employees cannot interrupt each other or schedule meetings. The best time is typically first thing in the morning or during a period of time when customers are not coming in.

Set up a Signal System
Meet with your department and agree on a signal that will indicate not to interrupt them unless it is an emergency. Some popular ideas:

- Wearing an armband or hat
- Installing curtains across cubicle doors
- Turning your nameplate around
- Hanging a sign on the door

This system will only work if employees use it properly and do not abuse it.

Create an Information Center
If people are constantly visiting your office looking for forms, brochures, or other standard information, try hanging a file system outside your office door, clearly labeling each section, and filling it with those items. Be sure to include your contact information in case they have questions.

Managing interruptions will be explored further in this session.

Quadrant 4: Not Urgent and Not Important

These are the activities that produce the most waste. Lingering over coffee, surfing the internet for hours, mindless TV watching, and gossiping around the lunch table are all activities that eat up our time but do not have any tangible results. Watch out for these black holes in your day! True recreation should re-energize you, not turn you into a mindless zombie.

YOUR TO-DO LIST

Make a list of the tasks that are on your to-do list right now, either at work or at home.

Now, prioritize the list using the Urgent-Important Matrix.

	URGENT	NON-URGENT
IMPORTANT	Quadrant 1: Crises	Quadrant 2: Big Picture
NOT IMPORTANT	Quadrant 3: Interruptions	Quadrant 4: Distractions

MANAGING INTERRUPTIONS AND DISTRACTIONS

In a study completed by the University of California, Irvine, researchers found that a typical office worker is interrupted or switches tasks an average of every three minutes and five seconds. The study also found that after being interrupted, it can take as much as 23 minutes and 15 seconds to get back on track.

Interruptions also occur more often in shared workspaces or cubicles – 29 per cent more than people who have private offices. Studies have also found that error rates can double or triple after an interruption of only a few seconds.

These statistics clearly show that reducing interruptions and distractions is key to good time management. It is crucial to accept that interruptions will happen, and that you must do what you can to plan for them.

TIPS FOR CONTROLLING DISRUPTIONS

- For a few days, keep a log of any interruptions that occur. Then use this information to determine whether the interruptions were valid or not valid and make a plan for dealing with these types of interruptions in the future.
- Research shows that people interrupt themselves 44 per cent of the time. It is important to maintain focus and be fully engaged in the work you are doing. Turn off notifications and close browser windows such as social media when you are not using them, to safeguard against being distracted by alerts.
- Schedule times for completing certain tasks such as checking email or returning phone calls.
- If absolute concentration is needed, work in a location away from your desk where you are less likely to be interrupted.
- Discourage interruptions by closing your door or wearing headphones, which also block out conversations other people are having around you that may distract.
- Evaluate and change your physical workspace to discourage distractions. For example, face away from the door so that your attention is not drawn away every time someone walks by.

- If you are in the middle of a task, learn to say no when people interrupt, or politely ask them whether you can speak with them at another time. Make sure you follow through.
- Determine times when you are available or not available, especially if you are a supervisor, and clearly communicate to your co-workers that they should not disturb you during these times unless it is an emergency, or the matter is something both urgent and important that cannot wait until a later time.
- When you are interrupted, save electronic files and mark your place so that you can easily return to that spot. This ensures that time is not wasted trying to remember what you were doing before the interruption occurred.

SESSION SIX: MAKING DECISIONS

Planning well and setting priorities, which were discussed in the previous two sessions, depend on the ability to make good decisions.

In this session, you will explore the eight ingredients necessary for making good decisions, and work through a scenario that allows you to practice this skill.

EIGHT INGREDIENTS FOR GOOD DECISION MAKING

1. Focus on the most important things. Of all the things you are judging, one factor is the most important and must be given greater weight than anything else.
2. Do not decide until you are ready. Do not act on impulse or succumb to decision panic.
3. Look for the positive results that can come from this decision. Make your decision as if you were afraid of missing a wonderful opportunity.
4. Consider the negative outcomes. If things go wrong, as they sometimes will, what is the worst that can happen? How can you mitigate problems?
5. Look ahead. Try to see how your decision will play out over time.
6. Turn big decisions into a series of little decisions. When a big undertaking seems like it could be too much to tackle all at once, take small steps, get more information, reconsider, and then make the next decision.
7. Do not feel you are locked into only one or two alternatives. There are always more options if you look for them. Go look for them.
8. Get what you need to feel safe. For some people, that means knowing the worst that can happen. For others, it means knowing they can back out at the last minute. For still others, it means knowing that everyone they care about agrees with the decision, or fully understands the situation they are in. Identify your safety needs related to the decision at hand.

WEIGHING THE PROS AND CONS

Scenario

You own a busy bakery that specializes in bagels, cupcakes, and special occasion cakes, and you are hiring a new baker/decorator. You have narrowed down the candidates to two, and must choose between them.

Candidate A is an older person with years of experience working at bakeries and catering companies. Because she is familiar with working in the industry, and has training and practice, you might be able to delegate some of your responsibilities to her, which is a bonus. But you also wonder whether she is up-to-date on the latest decorating techniques. This candidate has recently moved to the area, and because she has few ties to the community, you question whether she will stay long-term. She has also never made bagels before.

Candidate B is a recent graduate who has no work experience. While she has learned the latest techniques and seems enthusiastic, you worry that she might be slower at completing tasks because of her inexperience. On the other hand, because she has not worked in a bakery before, you think she probably has not yet developed any bad habits that you would need to correct. You would be able to teach and mentor her, but this would take extra time for you. She learned to make bagels during her pastry chef training. This candidate is from the area and will likely continue to live in the community for a long time. She is a hockey player, and so are you, so you have this in common. Because she is new to the industry, will she be able to handle the pressures and demands of working in a fast-paced environment?

You have spoken with references for both candidates. Candidate A is meticulous and detail oriented. Candidate B is a quick learner but a bit sloppy. You were told that both are good-natured and conscientious workers.

Which candidate will you offer the job to? ___________________________________

Make a list of pros and cons and use this list to reach a decision.

	Pros	**Cons**
Candidate A		
Candidate B		

SESSION SEVEN: DELEGATING

Delegating is an important skill to master as you learn how to manage your time well.

In this session, we will explore the five levels of delegation and some guidelines for success. You will then apply your knowledge to a case study.

ASSIGNING TASKS

Do not waste your time doing things that somebody else can do, especially if they can do them better than you. Save your time for those things that you are uniquely qualified to do

Delegating does not mean that you "give away" work completely. As the owner of a task, you must remember that you are ultimately responsible for the results that are achieved.

If you are not in a leadership position, you may be thinking that you do not have anyone that you can delegate to, but that is often not the case. In many work teams, we can delegate laterally to a colleague who has a particular expertise, who is looking for some skill development, or simply has some extra time.

In *The Creative Edge*, author William C. Miller defines five levels of delegation:

- **Tell**: "Based on my decision, here is what I want you to do."
- **Sell**: "Based on my decision, here is what I want you to do, because…"
- **Consult**: "Before I make a decision, I want your input."
- **Participate**: "We need to make a decision together."
- **Delegate**: "You make a decision."

You must find ways to delegate, no matter what your position is. Learn to clearly define who is to do what and let them show you that they can do it. Make sure your communication is clear so that they know what your expectations are and any limitations of the assignment (i.e. budget, time frames, or other resources).

There are five steps to the delegation process:

1. Explain why the job is important.
2. Describe what is needed in terms of results (not how, but what).
3. Give the person the authority they need to do the job.
4. Indicate when the job needs to be completed and get agreement.
5. Ask for feedback to ensure a common understanding.

GUIDELINES FOR SUCCESS

When should you delegate some of your work?

- After you have been in the job long enough to understand what it entails.
- When you have completed a skills, abilities, and interests inventory of your team members (formally or informally).
- When you understand the value of delegating.

What are some ways to prepare for delegating?

- Draw up a list of the current job responsibilities that you would leave behind if you were to suddenly leave your job.
- List the team members qualified to take over each of these responsibilities. If there is no one to take over a responsibility, leave a blank space.
- When the list is complete, add up the blank spaces to see what kind of department you would leave if you were suddenly out of the picture.
- Are you satisfied with the results?

What tasks should you delegate?

- Tasks that can be handled adequately by team members.
- Tasks for which team members have all the information for decision-making.
- Tasks that do not require skills unique to you or your position.
- Tasks for which an individual other than you can have direct control over the task.

- Tasks and/or projects that will contribute to growth and development of the individual who will carry out the assignment.

What tasks should you not delegate?

- The delegation process itself: Any work to be delegated should be delegated and explained by you.
- Performance evaluations and disciplinary actions: These are a managerial responsibility.
- Coaching, counseling and morale problems.
- Planning and forecasting: Some of the detail work can be done by others, such as calculations and research. However, you alone are in a position to decide how departmental goals fit in with the overall organization's goals.
- Confidential tasks and tasks that have been specifically assigned to you by your manager.
- Complex situations: Do not ask someone else to handle what you do not understand yourself.

How do you know whether you are delegating well or not?

If you are delegating well…

- You are satisfied with the way staff members complete work assignments.
- Team members feel committed and involved and morale is high.

If you are not delegating well, you may see these symptoms:

- You are too busy with work and under constant pressure.
- You are spending too much time on organizational details.
- Team members leave because they do not feel challenged or that they are learning, or they feel that you are difficult to work for.
- You have been bypassed for a promotion because you have difficulty handling your current responsibilities.

Note: If you feel you are not delegating well, confirm or put your suspicions to rest by seeking feedback from your team. If your suspicions are confirmed, formulate a plan to improve.

✪ **Extra Information**

The Story about Everybody, Somebody, Anybody, and Nobody

There was an important job to be done and **Everybody** was asked to do it. Everybody was sure that **Somebody** would do it. **Anybody** could have done it, but **Nobody** did it. **Somebody** got mad about it because it was **Everybody's** job. Everyone thought that **Anybody** could do it, and **Nobody** realized that **Everybody** would not do it. It ended up that **Everybody** blamed **Somebody** when actually **Nobody** blamed **Anybody**.

CASE STUDY: WHAT SHOULD SHEILA DO?

Sheila's Dilemma

Three months ago, Sheila looked forward to her promotion to supervisor. After four years in the department, she was confident of her abilities, and she knew her staff was capable and experienced.

Today, Sheila is not so sure she was cut out to be a supervisor. There seems to be no end to her workday. During office hours her day is filled with assigning work and reviewing results. To complicate matters, there is a steady flow of visitors, and the phone rings constantly. In the evening, when she would like to relax, she has to take care of administrative matters such as reading mail, answering letters, preparing budgets, and completing performance appraisals.

In frustration, Sheila asked her friend Carol for advice. She told Carol she was thinking about giving up her supervisor's job. She said she just could not face a career of working 60 hours a week. Carol listened and then said there might be another way: if the only issue was the time required to do the job, perhaps a review of how Sheila was using her time might help.

Consider Sheila's situation and answer the following questions.

Does she appear to be making effective use of delegation?

If her visitors are employees, how might she avoid interruptions?

Should Sheila consider establishing a quiet time when she would receive no calls or visitors? If so, when might be the best time of day?

Sheila feels she should assign all departmental work and review all results. Is there a more efficient way?

What other ways could Sheila gain more control over her use of time?

SESSION EIGHT: SCHEDULING

Along with setting goals, planning, setting priorities, making decisions and delegating, scheduling is intrinsic to competently managing your time.

In this session, you will learn how to organize your time through estimating how long it will take to complete tasks and then how to apply this knowledge to create a schedule.

ORGANIZE YOUR TIME

If you are receiving tasks and assignments by email, or your boss delegates assignments to you, make sure you organize these incoming items immediately. If something will take more than 30 minutes to complete, schedule it in your calendar and prioritize the items there. If the task will take less than 30 minutes, try to get it done right away so that you are not procrastinating over it, or do not forget that it needs doing.

Estimating Tips and Techniques

The following information relates to managing a project, but is also applicable to organizing time in general.

There are various types of time estimating techniques that you can use, depending on the stages of, and information you have, for a given project. For example, you might have just completed your work breakdown structure when your boss asks you for a project cost estimate. Depending on how quickly the turnaround requirement is for the number, this could be a good or fair estimate. Or, your boss may ask you how long it would take to complete a project similar to one you worked on last year. In either case, the type and quality of the estimate you provide is directly related to the information you have and are able to receive.

The main thing to remember when putting together a time estimate, regardless of how preliminary, is to list all assumptions and factors that you considered. Listing your assumptions and factors lets the reviewer know what your calculations were based on, and also provides a base for estimate comparison.

Gathering Resources

Estimating is not exact; it is a guess. If you or someone on your project team has completed a similar task before, then you should have a better idea of how long it will take to complete the task. It does not, however, guarantee that the estimate will be exact. If the project is new, you might have trouble finding someone who can advise you on how long a task will take to complete.

The more people who help you estimate, the better. This will allow you to generate an average expected completion time for tasks. Asking three different people for the time per activity is one way to get a good average.

As the project progresses, be sure to maintain a log of actual completion times for each task. This will enable results to be used as reference on future projects. Also, make special notes on where your estimations were too low or too high.

Activity List

Once you know all of the activities involved with a task, you are able to estimate how long it will take to complete the activities.

Since the work breakdown structure determines the unit by which you will provide estimates (months, days, hours, or minutes), be consistent when assigning durations to activities. All activities should have the same time unit.

CREATING A SCHEDULE

The steps involved in creating a viable schedule are:

Create a Work Breakdown Structure (WBS)

- Break the project down into manageable tasks

Estimate Task Durations

- Get project team or expert to help
- Be wary of over-ambitious estimates
- Be sure to add padding (15-20%)
- Include training time, if required

Convert the WBS to a Network Diagram

- Determine task relationships
- Create a model based ont ask relationships
- Perform CPM/PERT to determine critical path, float, and project duration

Add Resources to the Schedule

- Determine resources, skill sets
- Create a Resource Breakdown Structure (RBS)
- Level/smooth resources, if required

Estimate Overall Project Duration and Cost

- Determine project end date based on critical path

SESSION NINE: PUTTING AN END TO PROCRASTINATION

In this session, we will discuss procrastination, which often gets in the way of managing time well.

EATING THE FROG

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 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 about 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.

As Mark Twain said, “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 have 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 it (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.

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

What is standing in the way of eating that frog?

SESSION TEN: CREATING ORDER

Productivity research tells us that the average person spends about 10 per cent of the day (or one hour) looking for things.

If we have difficulty finding paperwork we need, or notes from a meeting, or research for a project, precious time will be wasted looking for them. Creating order is fundamental to managing time well, and it involves eliminating clutter and proper organization of workspace, papers, and electronic files.

In this session, we will discuss decluttering your workspace and then how to organize that space, focusing on your desk and your files.

DECLUTTERING

5S is one of the most widely used Lean tools. Lean process improvement is a culture of ideas, tools, and processes that are designed to eliminate waste and improve workflow, to provide maximum value for minimum cost.

Using this Lean process results in an office that is ‘decluttered,” and a decluttered office space has been proven to give you more energy, reduce stress and increase productivity!

The 5S Process is a way of organizing and managing the workspace and work flow with the intent to improve efficiency by eliminating waste. It incorporates a system of regular visual inspections and self-audits to identify opportunities for continuous improvements.

The “S” stands for:

- **Sort** – Removing unnecessary tools, equipment, and other items from the work area.
- **Straighten** – Effective and efficient storage of tools, equipment, and other items.
- **Shine** – Cleanliness involves housekeeping and helps in problem prevention.
- **Standardize** – Develop best practice routines, adapt tools, and improve access to simplify organizing.
- **Sustain** – Maintenance and continual improvement through spot checks and audits.

If you are going through a stack of paper or items, start out with three piles, and act on them quickly. Sort them into piles to: shred, store, or dump in the garbage.

Brainstorm some remedies for decluttering your workspace:

How do you tackle your paperwork and digital clutter?

MAKING CONNECTIONS

Here is a suggestion to help get rid of clutter in your workspace – all you need is a few recycling bags! Make four piles of all the papers you have strewn around, including those on the bulletin board, under your blotter or desk calendar, and on chairs. Sort the papers into categories and put them into the recycling bags. The categories we recommend are:

- Take home/get out of office
- Help yourself/giveaways to colleagues
- Cool stuff you want to keep and display
- Things to be filed or written into your planner

ORGANIZING YOUR WORK AREA AND YOUR PAPERWORK

A clean desk is not a sign of an empty mind! Do not fall prey to the false notion that a messy work area means you look busy, and thinking that if you look busy, then you are 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. If it will take more than 30 minutes, add the task to your planner.

Dump.
Throw out or take home all those things you have collected that you do not need or use. We are often accustomed to holding on to things and sometimes are afraid to throw out the wrong thing. We like the same rule for work that we use at home: if you have not used it for a year (or an entire business cycle), get rid of it, because you obviously are not using it.

Sort and group.
Your desk should be organized logically, with pencils and pens in one place, and 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 a 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. (Maintain some flexibility for emergencies, but make sure you get back to priorities as soon as possible.)

Do not save papers that you can easily find somewhere else.
Do not 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 papers we know we have but we cannot find. If a piece of paper is important enough to save, it is important enough to file for retrieval.

✪ Extra Information

One technique that we like is to use color coded folders for managing paper. If you put your current projects in a red or purple folder, let your colleagues know that they must not, under any circumstances, cover up a purple folder 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 folder 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, and these functions will help enormously if you have to search for the file later.

GUIDELINES FOR KEEPING A PIECE OF PAPER

Am I going to need to refer to this later?

- YES: File it
- NO: Recycle it

Do I have a digital copy that will suffice?

- YES: Recycle it
- NO: File it

Is it directly related to me or will someone else have a copy that I can refer to?

- YES: Recycle it
- NO: File it

Do I need to keep this for legal reasons?

- YES: File it
- NO: Recycle it

Does it fit in my filing system?

- YES: File it
- NO: Recycle it

If I file it, will I be able to find it?

- YES: File it
- NO: Recycle it

SESSION ELEVEN: ORGANIZING YOUR FILES

In this session, we will share some simple, basic principles that can help you store any type of information efficiently. We will also share a simple paper filing system and tips for electronic filing.

SORTING BASED ON FILE TYPE

The key principles of retrieval are:

- Group similar things together
- Place them in their own space or container
- Label them clearly

FILE CATEGORIES

Depending on what kind of files you are trying to organize, additional steps can be taken. Files can usually be divided into four categories.

Working Files

These include your current projects, routine functions, and quick references. These are the files where you keep 80 per cent of your work. These should be within arm's reach. They usually contain the following:

- The projects you are currently working on. This file should be cleaned occasionally to move projects to a reference file or to eliminate duplication.
- Fingertip information you need on a routine or daily basis, such as phone lists, client addresses, and computer codes.
- A follow-up file for each person with whom you come in contact on a regular basis, where you keep track of all correspondence with that person.

- A file for routine functions such as sales reports or other functions performed daily/weekly/monthly.

Since these files should be within reach, they might be in a large desk drawer. Make certain they are in file folders, labeled in large letters, and then placed in hanging file folders that are also labeled.

Usually it is more efficient to label hanging folders by category, rather than by a letter of the alphabet. Then categories can be alphabetized or color-coded.

Reference Files

These are files you must refer to frequently as you work on current projects. This is where the bulk of your files will be located. Since you use these files regularly, they need to be kept handy, but not necessarily within arm's length. The most important thing is to arrange all information in such a way that you can pull information out of the file easily.

Key questions for you to consider as this file is set up:

- What do I want to keep?
- What do I need to keep?
- If I wanted this information, could I find it elsewhere?

Information that should be in the reference file includes:

- Research for future projects
- Past projects to which the client refers

It can be helpful to consider key functions or components of your job, and make these the major categories for reference files. Other files might include:

- Sponsor files
- Administrative information

Cull all duplicates or useless paper. Have a recycling bin and shredding container nearby.

Establish subject categories, and label both file folders and hanging files. Put the file structure on paper prior to starting the filing.

Label file drawers and create a master list of files if the amount of information is large. Remember to use large, clear print with a fine tip felt marker.

Archive Files

These are the files nobody looks at. You keep them because the law says you must, because you are afraid you will need them if they are thrown out, or because nobody wants to take the time to do anything about them. They should be kept in a designated location far from your work area.

Disaster Files

This is one file that contains all vital information, including identification and financial references, in case you have to vacate the office unexpectedly. You can also have a file like this at home so you have things organized in the event of a disaster.

ELECTRONIC FILES

The key rule is that the file structure used in paper files and electronic files should parallel each other so that you can find things quickly. Use keywords and search programs to help you find your files even faster. If you are not sure how to use keywords, the "help" section of your software program should be able to show you how.

In this information age, we have to know what we need to keep and what we do not need to keep. Do not keep what you do not need. Do not ask, "Will I ever need this?" The answer is almost sure to be "Maybe." Ask instead, "Where could I get this if I needed it?"

THE BATCHING TECHNIQUE

The counterbalance to the “do it now” approach is batching. With this technique, you save several of the same type of things to do at once. Sometimes that is a more effective technique than doing each thing singly.

We can even batch our interactions with others. Do you ever remember what you wanted to ask someone or tell someone just after they walked out of your office or after you hung up the phone? You might save quite a bit of time by having a file for each of the people you interact with often.

Here are some examples:

- **Word processing files**: Batched and placed in categories. Develop a tree of directories and subdirectories, using the same categories as in the paper filing system.
- **Email messages:** Again, create directories and save only those messages that will be referred to again. Delete emails that you will not need again. (If that panics you, move them to an archive file.)
- **Voice mail**: Listen to your voice mail message. Does it do a good job of telling the person at the other end of the line what he/she should do? Try keeping a list of all the people you need to call, and make those calls all at once.

SESSION TWELVE: MANAGING YOUR WORKLOAD

If you want to manage your time effectively, you need a full picture of your entire workload. We can become overwhelmed with our workloads and frustrated by a lack of time to accomplish all of our tasks.

In this session, we will start by talking about one of the biggest time traps of all: email. You will analyze how much time you spend on email and think about ways to reduce that amount. You will also help Mary Marvelous address a workload crisis and think about how to apply those lessons back in your workplace.

MANAGING EMAIL

One of the greatest demands on our time is email, and so it is important to put it in proper perspective with the demands of our jobs. We have become a society where we expect replies to email immediately. Many people send emails out to more recipients and with more frequency than is often required.

While email is beneficial in many ways, it is also a huge contributor to people's stress. And it is not enough to just be able to check an email on a computer somewhere; many managers have a smart phone or other device that allows them to be connected to their email 24/7.

Let's see what kind of an impact email has on your day, in terms of time.

How many emails do you receive in an average day? _____________

How many of those emails do you reply to? _____________

How many emails do you send (not including the replies)? _____________

Let's say that an average email takes up three minutes of your time (and that is only if they are short and need minimal thinking on your part).

Take the total, multiply it by three minutes per incident, and put the total number of minutes per day that you manage email right here: ___________

Look carefully at that number. It is not unusual for managers to receive, reply to, and create up to 100 emails per day. One hundred emails a day is equivalent to 300 minutes, or five hours of time each day!

Since we normally have lots of additional tasks in the day in addition to email, is it any wonder that we struggle to get through the day?

✪ Extra Information

Here are some excellent tips for tackling your email.

Check your email twice a day.

Try first thing in the morning and again after lunch, or find two periods that work for you. This will stop your email from interrupting you over and over again, and allow you to get more done. You can set most email 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 email, this can be a hard switch to make. If you have trained people so that they know you answer emails 24/7, and always right away, you will have to adjust their expectations so that they know your new schedule. Try it for a week and then see just how much more relaxed your work pace becomes, and how much more you can accomplish.

Deal with each message right away.

Try to read an email 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 means that you need to set it up as a task or in your calendar or delegate it to someone else. Do not leave emails open to answer when you get a chance. When we do this, we tend to have multiple messages open, and then we have to re-read all those open emails to decide what to do with them.

Deal with it the right way.

Consider whether email is the best way to deal with something, or whether another method is more efficient. Emails that go to large groups of people, have multiple strings of replies, or include a lot of information are often best dealt with in a meeting or a conference call.

Do you have additional suggestions for staying on top of email traffic?

CASE STUDY: MARY MARVELOUS

One day, Mary Marvelous was seated at her desk working on a project when her boss, Dianne Delegator, requested a couple of minutes of her time. Dianne began the conversation by congratulating her for being selected as the person who had been chosen to develop the new health insurance policy. She explained that she was giving Mary this opportunity because of her extensive experience and management skills.

Dianne continued to explain, "We require a new health insurance policy for retiring employees who qualify for the special pension fund. A recent change in government policy requires immediate action. Normally, this type of change would require approximately eight months, but we have to have our policies in place in four months. We may also require a preliminary report within three weeks in order to update the government." After a brief pause Dianne said, "Get back to me if you have any questions about what has to be done."

On the way back to her office Mary felt proud and enthusiastic. She was happy that the boss was finally beginning to recognize her skills and abilities. When she arrived back at her desk and had a moment to reflection this new assignment, reality hit. She remembered the large number of projects already in progress. She sat down and wrote down a list of existing projects. Then she added "Employees' Health Insurance Policy" at the bottom.

She realizes that if she drops everything else to work on this new project, Dianne will be pleased. But sooner or later, she is going to want results from these other projects. Not only that, there are a couple of projects here that are high profile because of agreements with other departments and it would look bad if they fell behind. She realizes she cannot let them slide very long. She thinks to herself, “I am already working two evenings a week at home on office work and my family does not appreciate that.”

Something is definitely not right here, Mary Marvelous tells herself. This is an interesting job, but Dianne does not realize that I cannot do everything at once. There is no use telling her that I am overloaded, because she always says, “So is everybody. We just have to do the best we can!”

What should Mary do?

WORKLOAD ANALYSIS

Many people will recognize themselves in the case study. A workload analysis will help you get out of the sort of situation Mary was in.

What are the Benefits of Workload Analysis?

Workload analysis ensures that an organization’s resources are used effectively and efficiently, while enhancing productivity and improving performance.

These questions form the basis of workload analysis:

- What are the things you have to do every day? How much time must you allot to each thing?
- What are the things you have to do each week? How much time do you allot to them?
- What are the things you must do each month? How much time does each item take you?
- What are the things you do quarterly or annually? How much time do they take?

The 168-Hour Plan

Let's look at how you spent your time last week. There are 168 hours in seven days, so consider how you used them. Jot down how many hours you spent in each category below.

Task	Number of Hours
Personal Life	
Sleeping/eating	
Grooming/hygiene	
Driving or riding	
Exercising	
Cleaning/maintenance	
Talking to family/friends	
Mail/personal business	
Volunteering	
Praying/attending church/meditating	
Studying/reading	
Relaxing/watching TV	
Thinking/worrying/planning	
Other	
Sub-Total	
Business Life	
Planning/research	
Paperwork/computer	
Talking to co-workers/staff	
Appointments/meetings	
Clients/customers	
Phone calls	
Production	
Other	
Sub-Total	
GRAND TOTAL (168 hours)	

Was it hard to remember how you spent your time?

Did you take any time out this past week just for you?

How many things did you do that you planned to do?

How many things did you put off?

What is it you want to spend more time doing?

What do you want to do less?

Are you happy with the way you spent your time?

How many of these hours did you spend on the things that you said were a high priority?

When you look at your life so far, are you glad that you have taken the time to work on or complete a specific objective or participate in a specific activity?

Do you regret that you have not taken the time to do something?

✪ Extra Information

Time Management Systems are frameworks and techniques designed to help people manage their time better. There are many different approaches, from working for a certain number of minutes and then taking a break for a certain number of minutes, to ways to organize tasks. Several of these systems are discussed here: https://blog.hubstaff.com/time-management-tools/

PERSONAL ACTION PLAN

Now that you have completed this course on **Time Management**, how will you use the things you have learned? Creating a personal action plan can help you to stay on track and on target. When you take responsibility for yourself and your results, you get things done!

In this session, you will be asked questions to help you plan your short-term and long-term goals. This final exercise is a way for you to synthesize the learning that you have done and to put it into practice.

I am already doing these things well:

I want to improve these areas:

I have these resources to help me:

As a result of what I have learned in this course, I am going to…	**My target date is…**	**I will know I have succeeded when…**	**I will follow up with myself on…**

COURSE SUMMARY

Congratulations! You have completed the course “Time Management.”

We began this course by looking at what time management is, and the six principles of time management.

Next, we covered how to set goals using the SMART method.

Then we explored different planning tools and their uses.

We then looked at how to set priorities in order to decide in what order tasks should be done. As well, we discussed how to manage interruptions and distractions.

Next, we moved onto ways to make decisions, which is important for managing your time.

Then, we learned about delegating and how this is an effective tool for managing your time well.

Next, we shared tips for creating a schedule, including tips for estimating how long it takes to complete tasks.

The next session discussed procrastination, and how this affects time management.

Because disorganization is a time waster, we then looked at ways to create order through decluttering and using good organization techniques.

Then, we explored ways to manage paper and electronic files, including email.

To wrap up the day, we looked at workload analysis, and completed a 168-hour plan.

You should now feel ready to effectively manage your time for peak performance.

RECOMMENDED READING LIST

If you are looking for further information on this topic, we have included a recommended reading list below.

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