

# Time & Task Management



Welcome to Time & Task Management



*He who every morning plans  
the transaction of the day  
and follows out that plan,  
carries a thread that will  
guide him through the maze  
of the most busy life.*

*—Victor Hugo*



Victor Hugo said, “He who every morning plans the transaction of the day and follows out that plan, carries a thread that will guide him through the maze of the most busy life.”

## Learning Objectives



After completing this module, you will be able to:

- Define prioritization
- Describe the benefits of the Time Matrix
- Use the Time Matrix to manage and prioritize time
- Use the Priority Pyramid to organize daily schedules and follow up in a timely manner
- Use Time Management software to prioritize and organize

After completing this module, you will be able to:

- Define prioritization
- Describe the benefits of the Time Matrix
- Use the Time Matrix to manage and prioritize time
- Use the Priority Pyramid in conjunction with the Time Matrix to organize daily schedules and follow up in a timely manner
- Use Time Management software, like Outlook, to prioritize and organize tasks

# Agenda

TIME	TOPIC
5 Minutes	Introduction
5 Minutes	Definition and Benefits of Prioritization
15 Minutes	The Time Matrix
15 Minutes	Productivity Pyramid
15 Minutes	Skills Practice
5 Minutes	Conclusion

# What is Prioritization?

Organizing or completing things  
in the order of their importance.

What is Prioritization?

Prioritization is organizing or completing things in the order of their importance.

# Benefits of Prioritization

## More Productivity

Prioritization can help you accomplish more work, and can increase free time.



Prioritization makes us more productive. It helps us to accomplish more work, and it can increase our free time.

# Time Management Activity

You Decide!

- ☐ Parents
- ☐ Spouse
- ☐ Children
- ☐ Community
- ☐ Phone
- ☐ Company President
- ☐ Co-workers
- ☐ Customers
- ☐ Email
- ☐ Government
- ☐ Television, Radio
- ☐ Neighbors
- ☐ Landlord
- ☐ Boss
- ☐ Peers
- ☐ Unknown Forces

We're going to do a short exercise.

Review the "Who Decides?" Exercise Handout.

Put a check by any one or anything you feel is in control of your time. Take 5 minutes to complete the exercise.

If you checked anything on the list, you need to realize that ultimately only you determine how you spend your time. The degree you believe anyone else controls your time is the degree to which you'll have to struggle to win back your time. Even if you checked "boss," who may pile on the assignments, you determine how and when you'll tackle them. You are in the control booth of your life.

# Why Prioritize?

## First Things First

Prioritizing tasks ensures that you meet your most important goals first. If there's anything you don't have time for, it will be the least important item on your agenda.



Prioritizing tasks ensures that you meet your most important goals first.



# Why Prioritize?

## • *Urgency*

**Requires immediate attention**

**Time-sensitive**

## • *Importance*

**What really makes a difference**

**Values, Personal Mission**

**High-priority Goals**

So first, we need to understand two key words of Prioritizing: urgency and importance.

Urgency means it requires immediate attention. It is now. Urgent things act on us, urgent things come from outside you, they press upon you, because they are time-sensitive, like a ringing phone. They might be important as well as urgent, but too often they are merely urgent.

Importance on the other hand, has to do with what really makes a difference. The important priorities come from within. These priorities come from your values, your personal mission, your organization's mission, and your high-priority goals.



*“I have two kinds of problems, the urgent and the important. The urgent are not important, and the important are never urgent.”*

*—Dwight D. Eisenhower*



Dwight D. Eisenhower said, “I have two kinds of problems, the urgent and the important. The urgent are not important, and the important are never urgent.”

# Prioritize

## Important and Urgent

- Approaching deadlines
- Emergency revisions
- Crisis situations

### *The Time Management Matrix*

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	
Not Important		

So, let's take a closer look at the Eisenhower Matrix (or Time Matrix) and How to use it.

Prioritizing tasks by urgency and importance results in 4 quadrants with different work strategies:

Quadrant 1 consists of activities that are both urgent and important. These are the things that must be done first. For example, an important client calls you with a pressing deadline or revisions. Your child gets sick. A crucial system breaks down. A key meeting is suddenly called. If you don't go to that important meeting, there will be tough consequences, so it's a Quadrant 1 activity. Quadrant 1 is the quadrant of necessity. We **must** spend time here.

But if you only focus on Quadrant 1, it keeps getting bigger and bigger until it consumes you.

# Prioritize

## Important but Not Urgent

- Projects not near the deadline
- Daily tasks

### *The Time Management Matrix*

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	Quadrant 2 Important but Not Urgent
Not Important		

Quadrant 2 activities are not urgent, but they are important.

Quadrant 2 is where we do things that are scheduled to be done. Here we become proactive. We plan and prepare for the future. We think to prevent problems.

We build relationships. We empower ourselves through learning and skill development. All the things that we know that we should do, but don't because they aren't urgent, like our daily tasks.

We call Quadrant 2 the quadrant of effectiveness. This is where effective people focus their energies. You see, Quadrant 2 won't act on you; you must act on it. We never seem to get time for Quadrant 2. Ironically, however, the more time you spend in Quadrant 2 doing preparation, planning, and prevention, the less time you will be forced to spend in Quadrant 1, managing the last minute crises.

# Prioritize

## Urgent but Not Important

- Phone calls
- Work emails
- Interruptions by coworkers

### *The Time Management Matrix*

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	Quadrant 2 Important but not Urgent
Not Important	Quadrant 3 Urgent but Not Important	

Quadrant 3 activities are urgent but not important. It includes such things as unnecessary meetings and reports, many emails and phone calls, and other people's minor issues.

Quadrant 3 is the quadrant of deception because urgent things have the appearance of importance, but most of the time they are not. It might be like the meeting that has no agenda, no purpose. It might be an unnecessary interruption in your day. It might be a knee-jerk response to that email that just showed up on screen, but doesn't really matter much. These are items that we may even be able to delegate.

Beware of Quadrant 3 – it is the culprit that bankrupts individuals and organizations.

# Prioritize

## Not Important and Not Urgent

- Checking social media
- Cleaning your desk
- Small talk

### *The Time Management Matrix*

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	Quadrant 2 Important but not Urgent
Not Important	Quadrant 3 Urgent but not Important	Quadrant 4 Not Important and Not Urgent

Quadrant 4 is neither urgent nor important.

Quadrant 4 is the quadrant of waste and excess. It's all those things that we do to escape, like checking social media, watching mindless TV, playing endless games, wasting hours on the Internet, small talk.

People who escape to Quadrant 4 are usually burned out by living in Quadrant 1 and 3 all of the time. They are addicted to urgency, and it takes a toll.

# Prioritize

## Above the Line

- Important
- Quadrants I & II

### *The Time Management Matrix*

	Urgent	Not Urgent
Important	Quadrant 1 Important and Urgent	Quadrant 2 Important but not Urgent
Not Important	Quadrant 3 Urgent but not Important	Quadrant 4 Not Important and Not Urgent

If you examine most people's agendas against the four quadrants, you'll find almost all of their time is spent in Quadrants 1 and 3. What happens then to

Quadrant 2? It gets pushed aside.

Now what happens to Quadrant 1? It gets larger. How long can you sustain a Quadrant 1 lifestyle? What are the results?

Doesn't it soon stress you out? Doesn't it eventually burn you out? Endlessly fighting fires, moving from one crisis to the next. Gradually it takes its toll on your body and on your mind. It is not sustainable.

So where do you get time for Quadrant 2, when you're inundated by urgent, pressing matters? You stop spending so much time in Quadrants 3 and 4. You literally say no to those activities. You live above the line that separates Quadrants 1 and 2 from Quadrants 3 and 4.

It's really not that difficult to cut those wasteful and excessive activities in Quadrant 4. The real challenge is not to let Quadrant 3 rob your time.

When people start to think in Quadrant 2 ways, there will be fewer crises, more balance, and greater vision. Moving from crisis to crisis, never getting to Quadrant 2, is like swatting flies all day long. When will you stop swatting the flies and start fixing the hole in the screen door?

We need to live above the line.

# Productivity Pyramid



Let's view the Productivity Pyramid

The Pyramid covers every aspect of their life. We will be focusing on the Top 2 Tiers which can be done using any Time Management software such as Microsoft Outlook.

We will cover Daily and Weekly planning in further detail in a few minutes, but for now, here are some Goal-Setting Tips:

1. Write it Down
2. Give it a Deadline
3. Break it down into Doable Chunks
4. Commit



## Weekly & Daily

- Customer follow up
- Tasks
- Emails
- Voice Mails
- Assignments

When it comes to planning and prioritizing, we think of customer follow up, tasks, emails, voice mails, and assignments.

Do these sound familiar? These are items we discussed that fall into Quadrants 1 and 2.

So how do we stay focused day to day without losing sight of the big picture?

# Email Management

## 4 D's of Time Management

### *Delete*

- Not important, Delete immediately
- Junk Mail
- Marketing Emails

### *Do*

- If takes less than 5 minutes
- Do It Now
- File it Away

### *Delegate*

- If someone else can or should handle it
- Forward It
- File it Away or Delete

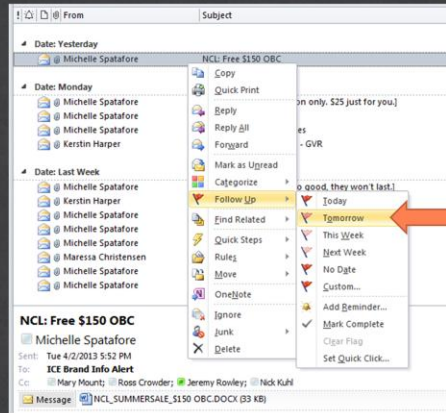
### *Defer*

- It takes more than 5 minutes
- Flag It
- Do It Later

To tame your Email Inbox, you should follow the 4 D's of Time Management:

- Delete It – If it is not important, you should delete it immediately. These are emails that are junk and marketing emails that are not important to you.
- Do It – If it takes less than 5 minutes, you should do it now and then file it away and move on.
- Delegate It – If someone else can or should handle the email, then forward it to them and either file it away or delete it. And,
- Defer It – This can sometimes be the hardest of the 4 D's – If it will take more than 5 minutes to take care of it, you should Flag it to take care of later. We'll discuss how to do this in a bit.

# Defer It

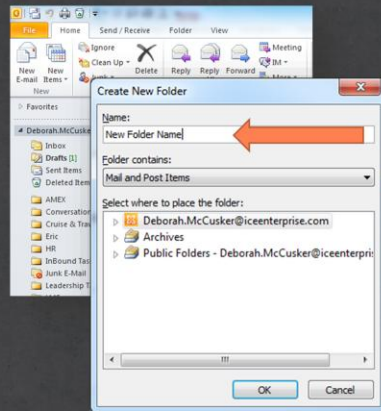


- Right-click on the email, hover to “Follow Up” and make a selection.

Let’s say we do not need to currently react to the email named “NCL: Free \$150 OBC” – to mark this email for future follow up, simply right-click, hover to “Follow Up” and make an appropriate selection. The selection options might be to follow up Tomorrow, or you can click on the “**Add Reminder**” selection and setup a reminder for a specific date and time. This is the most specific and will keep you from forgetting a “Tomorrow” follow up, which will simply show on your To Do area of Outlook.

That probably took a total of 2-3 seconds. Now, you can do the same thing to any other emails that do not need immediate follow up.

# Email Folder List



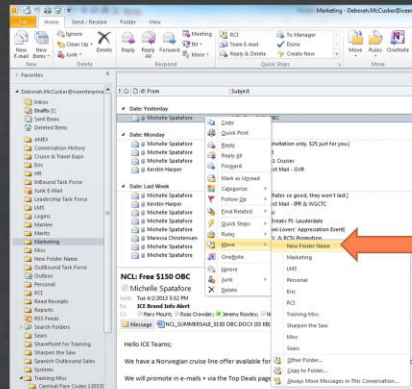
- **Right-click** on your name, hover to **“New Folder”** and click.
- Type the name of the Folder as you would like it to appear.
- Click **OK**.

Many emails are informational only and do not need to be saved. At the time when you’ve read the email, you may simply Delete the email. If the email is something that needs to be saved for future reference, you can create and save the emails in Folders. The Folder List is located on the left side of the Outlook window.

To create folders, think of your workflow. You may create folders based on product or brand and you may create folders that are specific to items from your direct supervisor.

To Add a Folder, right-click on your name (located under the “Favorites” area in the Left Navigation Pane.) Click on the “New Folder” option and a “Create New Folder” window opens. In this window, type the name of the folder as you wish it to appear and click the “OK” button.

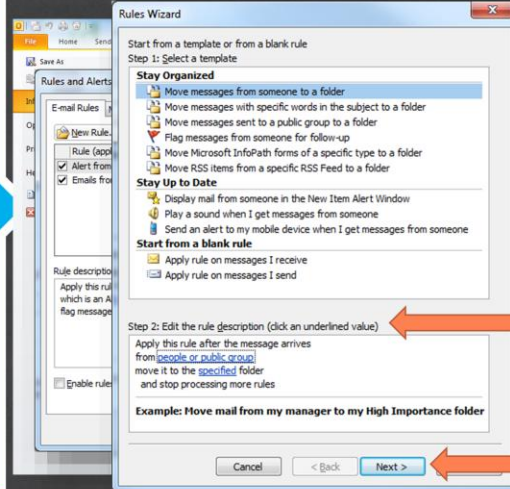
# Email Folder List



- **Right-click** on the email, hover to **"Move"** and click on the Folder name where you would like to save the email.

The Folder will now be located in alphabetical order in your Folder List in the Left Navigation Pane. To move an email to the Folder for future reference, simply click and drag the email to the folder. You may also right-click on the email, hover to "Move" and click on the Folder name where you would like to save the email.

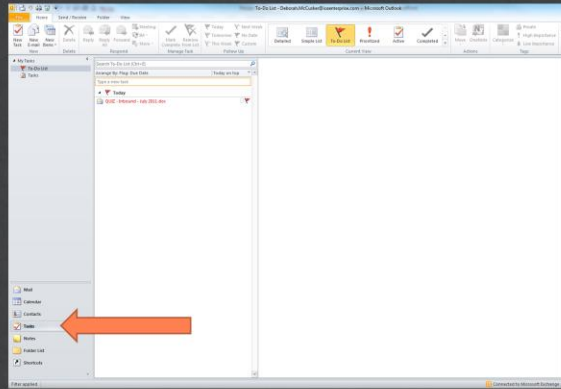
# Rules and Alerts



- Click **File** and select **Manage Rules & Alerts**
- Click **"New Rule"**
- Make appropriate selections to manage emails
- Follow the Wizard to complete the Rule

Manage Rules & Alerts allows you to change email colors, flag specific messages, as well as move emails to specific folders.

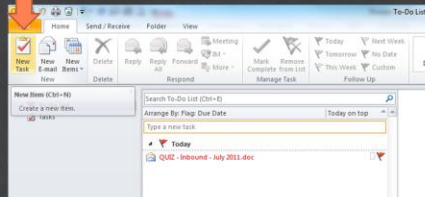
# Email Task List



Outlook may also be used to schedule, track, and remind you of specific Tasks. The Tasks are separate folder located in the Left Navigation Pane of the Outlook window.

The Task area of Outlook will change the Tabs and Tab Groups located at the top of the Outlook window.

# Email Task List

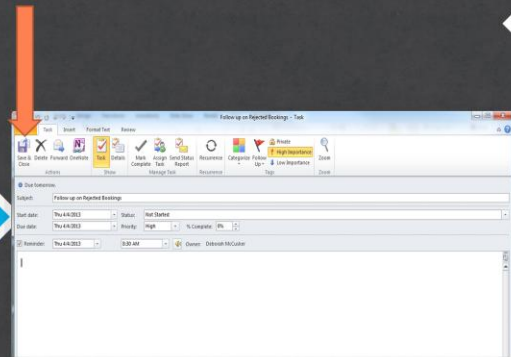


- Click **New Task** on the Home Tab.

To create a Task, simply double-click anywhere in the empty white space of the window OR select the “New Task” icon on the Home Tab.



# Email Task List

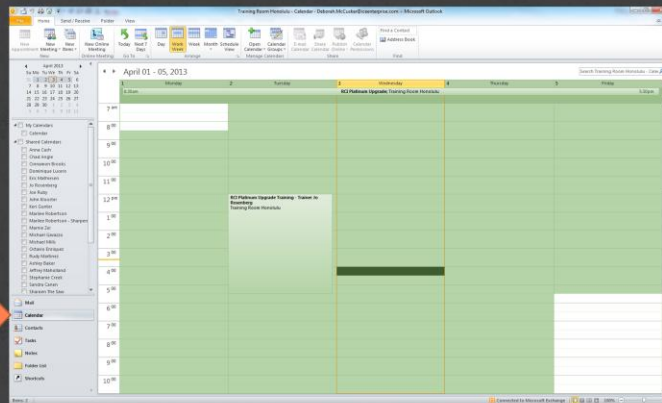


- Type the name of the Task, select the Start and End Date, Reminder time, and any other options you wish.
- Click **Save & Close** on the Task Tab.

Type the name of the Task, select the Start and End Date, Reminder Time, and any other options you wish. Click on the Save & Close button on the Task Tab.

Or, you may simply Click and Drag the Email to the Tasks Folder. A New Task will automatically open for you to edit and save accordingly.

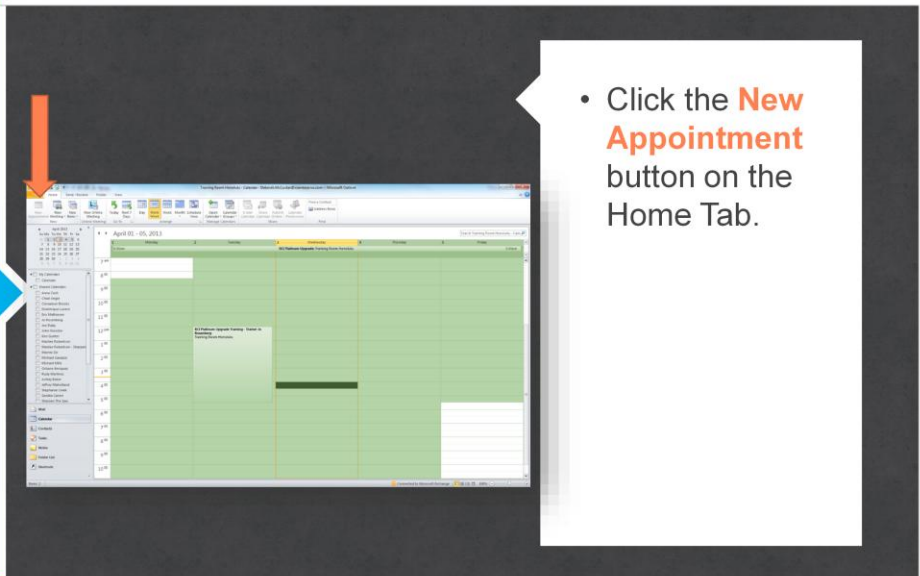
# Email Calendar



The Outlook Calendar is another way to schedule tasks and assignments. To view the Calendar, simply click on “Calendar” in the Left Navigation Pane.

Many of you have probably already received Calendar Invitations for meetings, such as this one. The easiest way to schedule items on your Calendar is by Accepting a Calendar Invitation someone else has already setup. Simply click on the “Accept” button from the email.

# Email Calendar



To add an appointment to your Calendar, click on the “New Appointment” button on the Home Tab.

# Email Calendar



- Type the Subject, select the Start and End Dates, select the specific time period for the Appointment, Reminder, and any other options you would like.
- Click the **Save & Close** button on the Appointment Tab.

In the Appointment window, type the Subject, select the Start and End Dates, select the specific appointment time, select the Reminder, and any other options you would like. Once the appointment is completed, click on the “Save & Close” button on the Appointment Tab.

As with Tasks and Email follow up, you will want to setup a Reminder. Reminders are automated and therefore, will not be forgotten when used appropriately.

# Voice Mail Management

## 4 D's of Time Management



Many email programs are connected to voice mail, so you may simply follow the same 4D's of Time Management. Do not return calls based on First-In, First Out. Listen to all voice mails making detailed notes on each, then manage them accordingly: Delete, Defer, Delegate or Do, meaning call the person back and speak with them.

Some companies may require employees to respond to voice mails within a specified amount of time. If this is the case, it may be helpful to place an hourly reminder to spend time checking and responding to voice mails. This way, you do not feel the urge to get to them as soon as they arrive.

## Skills Practice Debrief

*Review the tasks you categorized:*

- *How did you decide which tasks are Urgent?*
- *How did you decide which tasks are Important?*
- *Are the priorities of others always the best guide?*

Let's review our Handout again.

After you have listened to what you've learned in this course, how would you change the priorities on the list? How did you decide which tasks were Urgent? Important? Would you change any of your priorities?

## Summary / Q&A

- Define prioritization
- Describe the benefits of the Time Matrix
- Use the Time Matrix to manage and prioritize time
- Use the Priority Pyramid to organize daily schedules and follow up in a timely manner
- Use Time Management software to prioritize and organize

In this course, we learned the definition of prioritization, we should now be able to describe the benefits of the Time Matrix, use the Time Matrix to manage and prioritize time, use the Priority Pyramid to organize daily schedules and follow up in a timely manner, and use Time Management software to prioritize and organize your daily life.



Thank you for attending and remember to use the Time Matrix and the 4D's to become more productive.