IMPROVE YOUR WORKFLOW: Managing Your Time – Tips and Tricks

Purpose: It can feel overwhelming to manage a million priorities and keep up with our workload. You want to get organized, but who has the time to think it all through? In this emPower Tool we have some of our favorite tips and tricks for increasing productivity and streamlining your work processes to have more time to get work done, and less time feeling overwhelmed.

> **More emPower Tools**
> **+ learn more about each topic**
> *thecapacitycollective.org/ resources*

🕐 Designated Time, Designated Place

- Keep **like things together**; everyone knows where to find them, and restocking becomes easier.
- Have a system for noting when something needs to be **restocked** and restocking it (e.g. red post it notes).
- Organize in a way that **maximizes flow** and minimizes the need to walk around, search or dig for things.
- Organize your recurring tasks. For example:
  - **Daily:** Emails, scheduling appointments, planning visits or supervision
  - **Weekly:** Processing referrals in/out, working on a long-term project, making copies
  - **Monthly:** Reimbursement, payroll, ordering
- Set aside a recurring date and time to get those processes done.
  - Everyone will know **what to expect** (i.e. "I know I will hear from her on Tuesday")
  - You will be able to comfortably ignore the process until it's **time** (TIP: set up email folders to filter messages, and have a process, like including "MILEAGE" in the subject line).
- At least once a day or week, give mental time and space to something that moves you closer to a **future goal**. Keep moving in the direction you want to be. Make sure this possible for staff at **all levels**.

⃠ Multitasking Doesn't Work

If you have found that multitasking doesn't work for you, you are not alone!

- ✓ Research tells us people are more productive, and more likely to get things done well and on time, when they focus on **ONE task at a time**.
- ✓ We are most productive when we are in a state of **flow**, where we have enough brain capacity and energy to give a task exactly what it needs.
- ✓ Productivity experts suggest doing one thing at a time. **Complete the task**, take a short break to clear your mind, then dive into the next task.
- ✓ Productivity experts recommend working on one specific task for a **set time** (maybe 60 minutes), then taking a short break, and starting on the next task.
- ✓ **Set up** your workspace and your schedule to make sure you can work this way.

☝ Touch Once

The more times you touch a process, the more time it takes and the more opportunities for error you have. Organize your processes in a way that minimizes how often the process must be touched.

Decide Once ☑

Develop processes and procedures so you can make decisions once, rather than again and again as a situation arises. The decision can change; it is just important to have a standard process.

◌ Make it a Process and/or System!

Making decisions again and again takes time and brain space. It causes stress for staff and increases errors in data. Make things run more smoothly by developing policies, procedures and systems so decisions are already made. Include staff in the process—they are the experts of their processes!

- Have a process for **recurring tasks** that happen daily, weekly, monthly, etc.
- Standardize and document the steps as a group, share tips and tricks, then **improve processes** together.

  See the Improve Your Workflow: Conducting a Process Review emPower Tool for an overview

- Create **systems** to make sure things get done without having to make assignments again and again:
  - Clear **roles** (who does what)
  - Clear **processes** (what happens when)
  - Clear **timeline** (daily @ 2pm; Mondays @ 9am)

▭ Make Processes Easy to Remember

When processes have multiple steps, you can make them easier to remember (especially when training new staff!) by creating checklists with:

➔ Visual Cues

- ☐ Make a visible "cheat sheet" with steps
- ☐ Consider using numbers or icons as visual cues
  - ① for step one, etc.
  - ⚲ for search, ✎ for writing notes, etc.

➔ Acrostics

- ☐ **P**rocess steps are
- ☐ **E**asier to
- ☐ **R**emember when they
- ☐ **M**ake words!

> *Example: TAPS*
> **Planning a Home Visit**
> - Choose the **T**opics
> - Choose an **A**ctivity
> - **P**rint Handouts
> - **S**end a Reminder

⚕ Set Yourself Up For Success! ⚕

🧹 *Mess = Stress*

- Clutter makes it hard to concentrate and get into a good flow of work. Tidy up.
- *Check out the Improve Your Workflow: Organizing Workspaces with the 5S System emPower Tool for tips on streamlining your workspace to improve workflow.*

🗣 *Say "No" More Often*

- Replace concern about how you might disappoint someone by saying no to a non-critical task by remembering how many important and meaningful tasks you can do *better* when you have time and focus.
- Practice it—you will get better.

1️⃣ *First Things First*

- Tackle the most daunting, annoying or challenging task first thing in the morning.
- Mornings are when most people have peak energy, and all of the day's demands have not yet filled up your brain's capacity.
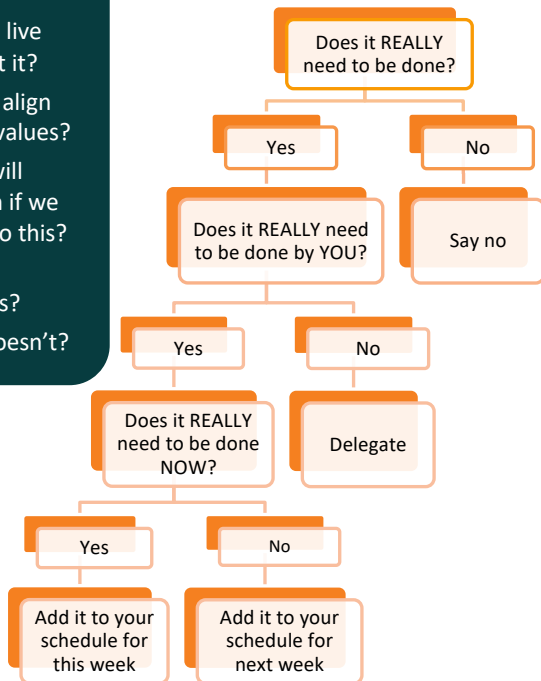- Get it done—don't let a task have free rent in your brain.

🔔 *Turn Off Distractions*

- Set up your technology to be helpful to the success of your team, not a distraction.
- Turn off unnecessary alerts. Shut down social media. Wear headphones playing white noise or calm music.
- Close the door, even if it is just for a few hours a day.

△ Is it REALLY Needed?

Before you take on that task/project, ask yourself:

- ✓ Can we live without it?
- ✓ Does it align to our values?
- ✓ What will happen if we don't do this?
- ✓ Who benefits?
- ✓ Who doesn't?

Does it REALLY need to be done?
- Yes
- No → Say no

Does it REALLY need to be done by YOU?
- Yes
- No → Delegate

Does it REALLY need to be done NOW?
- Yes → Add it to your schedule for this week
- No → Add it to your schedule for next week

✏️ Write it Down

- ✓ Every task and commitment should be written down in a consistent, reliable system. This frees your mind from trying to remember and manage everything.
- ✓ Incomplete tasks take up mental space and energy, chipping away at your time and capacity.
- ✓ Get every commitment, large and small, out of your head and into a trusted system.

Need a system? Check out the *Improve Your Workflow: Collaboration Tips and Tools* emPower Tool to learn about **Trello**!

🕊 Align the Work to Your Values

We stay motivated and engaged in our work when it feels **meaningful**, and aligns with our **personal values** (like equity, anti-racism, and/or social, environmental and economic justice).

- Think about what you want your life to look like. What would a life with **meaning** look like for you?
- Think about what makes your work meaningful for you. Where do you get to **contribute**? Where do you get to inform **change**? Where would you like to be doing more?
- When you face a **challenging** or daunting task, think about how it does or does not fit with your values. When it does, it becomes easier to power through.
- When you face a **decision** of whether or not to take on a project or task, look at your values: does this project align with those values? If it doesn't, say no, when you're able to.

For more information on….

Organizing your **physical workspace** to maximize workflow

Organizing your **electronic workspace** to maximize workflow

Reviewing processes in a methodical way to **improve processes**

Finding specific **opportunities** to improve processes

Streamlining the **communication** between your team members

Taking the **collaboration** between members of your team to the next level

…check out these emPower Tools

➔ Improve Your Workflow: Organizing Workspaces with the 5S System

➔ Improve Your Workflow: Organizing Electronic Workspaces

➔ Improve Your Workflow: Conducting a Process Review

➔ Improve Your Workflow: Eight Opportunities

➔ Improve Your Workflow: Communication Tips and Tools

➔ Improve Your Workflow: Collaboration Tips and Tools