



# Managing Actions

The art of doing the right work  
at the right time

“ He, who every morning plans the transactions of the day, and follows that plan, carries a thread that will guide him through a labyrinth of the most busy life. ”

Victor Hugo

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# About the authors



**Dermot Crowley** is the founder of Adapt Training Solutions, and is one of Australia's most recognised thought leaders on personal productivity.

His combined passion for productivity and technology led him to start Adapt in 2002, with a clear focus on helping busy executives manage their time, priorities and email in today's modern workplace.

Dermot is a powerful speaker, trainer and coach. He works with some of Australia's most successful businesses, helping them leverage the effectiveness of their people, as well as the power of their technology.

**Tony Hall** has been a senior trainer and coach with Adapt since 2003. He relishes the opportunity to take individuals and teams on the journey to greater productivity through the smarter use of technology.

With 25 years experience as a facilitator, Tony's workshops are practical and engaging and always ensure every participant walks away from their experience with the tools and mindset needed to perform at their best.



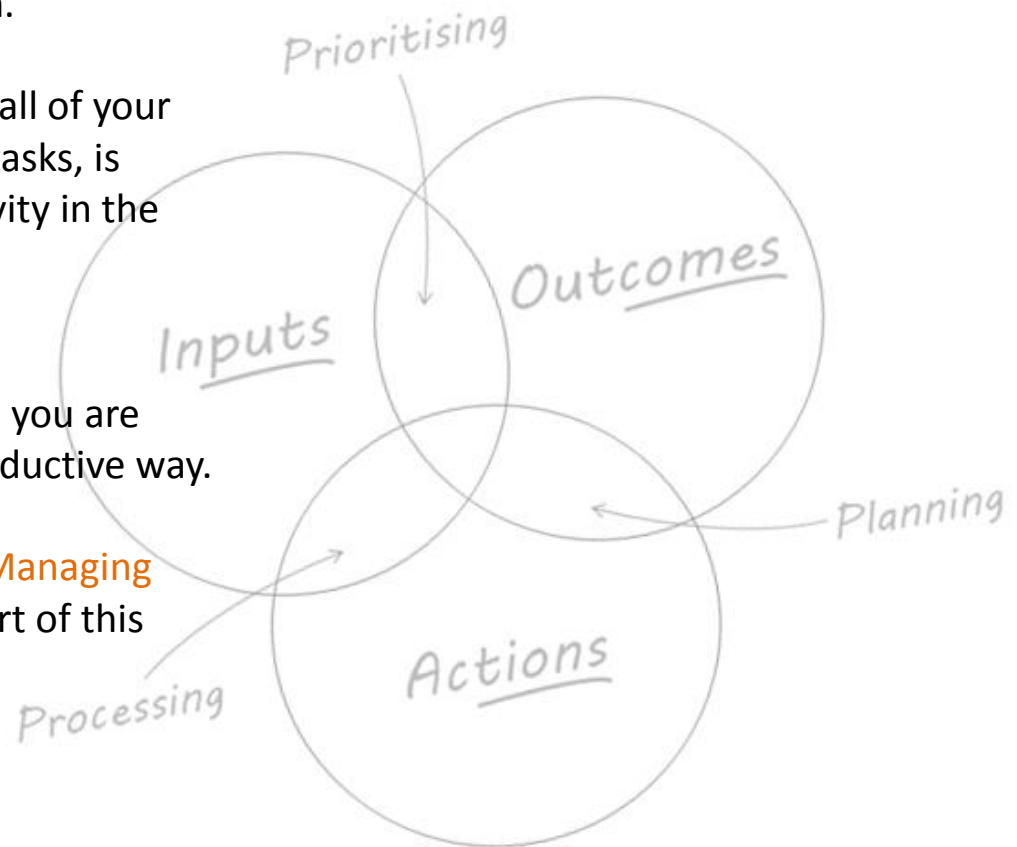
# Managing actions

**Managing Actions** is the first of three whitepapers designed to define the core principles that underpin the Adapt productivity system.

Having one central 'source of truth' for all of your actions, whether they are meetings or tasks, is critical to achieving maximum productivity in the modern workplace.

This paper will discuss a range of action management principles that will ensure you are working in a focused, proactive and productive way.

Look out for the **Managing Inputs** and **Managing Outcomes** whitepapers that are also part of this series.



# Three key action principles

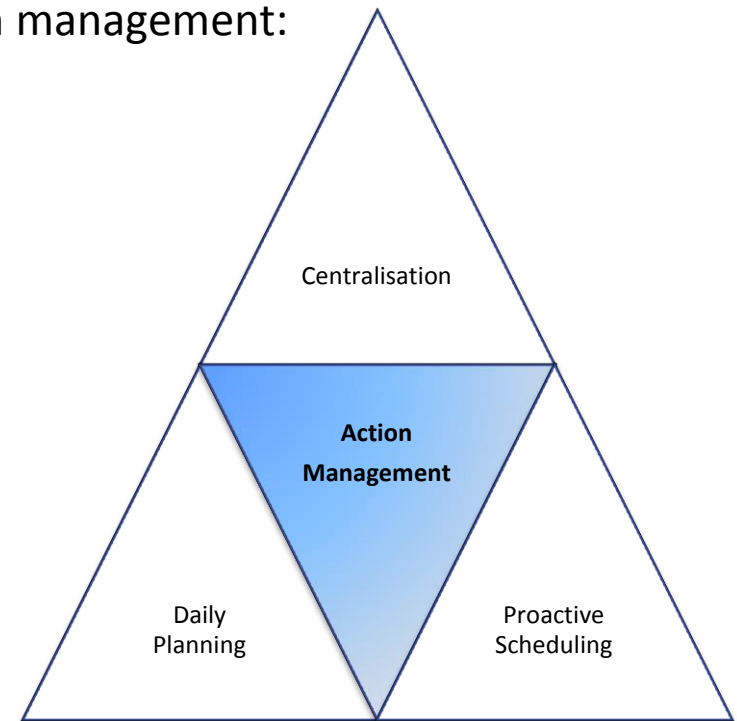
Most of us have many, many things that demand our time and focus every day. Some of these actions get done in the day, but some get added to the 'pile' of actions awaiting our attention. If not managed well, this pile, or more accurately, number of piles can make us feel overwhelmed and out of control. Things will slip through the cracks or end up being left to the last minute, causing stress and shoddy work.

There are three principles central to effective action management:

**Daily Planning** – This is about getting focused on what you need to do today, and creating a plan of action that will create momentum and traction for your priorities.

**Proactive Scheduling** – This is the discipline of deciding when you are going to consider doing the work you cannot do today, and therefore allocating the resource of time to the activity.

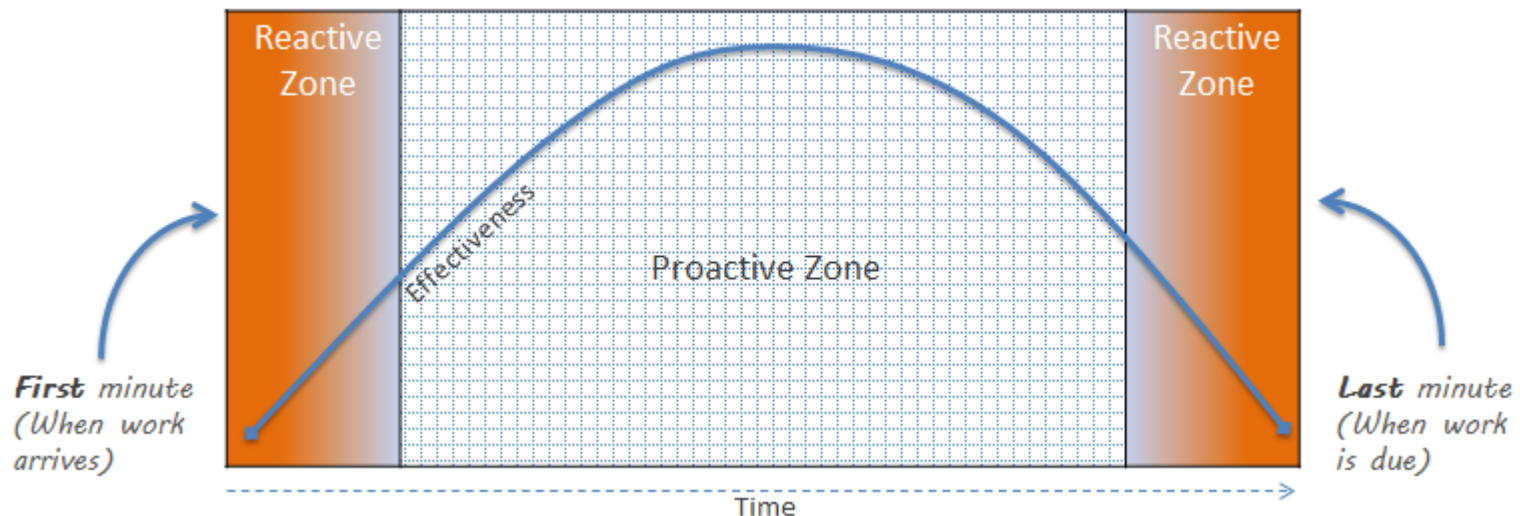
**Centralisation** – This is the discipline of making all of your outstanding work visible in one central tool where it can be scheduled, prioritised and managed.



# The benefit of proactivity

When we choose to do our work has a huge impact on the end product, and on our other work. If our work style is always to do work the minute it arrives, we become reactive and end up jumping from thing to another. This is commonly called 'firefighting', where urgency is the main driver, and the quality of our work diminishes as our stress levels rise.

If we leave everything until the last minute, we also end up reacting as time and flexibility runs out. The quality of the work suffers and the stress levels rise again. The diagram below shows how scheduling work in the proactive zone helps us to work proactively, which increases the quality of our outputs, reduces our stress levels and gives us far more control over our commitments and priorities.



# Focus with a Daily Plan

A daily plan is an critical tool to give focus and intent to your day. It clearly maps out your priorities and commitments, and ensure that you are focused on the right work, and not getting distracted by busywork. It can also help you to prioritise and manage new incoming work as you will have something to measure their importance against.

Your daily plan should:

- ✓ Contain only the commitments and priorities that you will attempt to do today
- ✓ Show both your meeting and task workload for the day
- ✓ Be the main driver of your time and attention through the day
- ✓ Be a realistic, balanced and achievable plan of action
- ✓ Be updated as you progress though the day (completions, reschedules and additions)
- ✓ Be created every day, either at the end of the day for tomorrow, or first thing in the morning for today



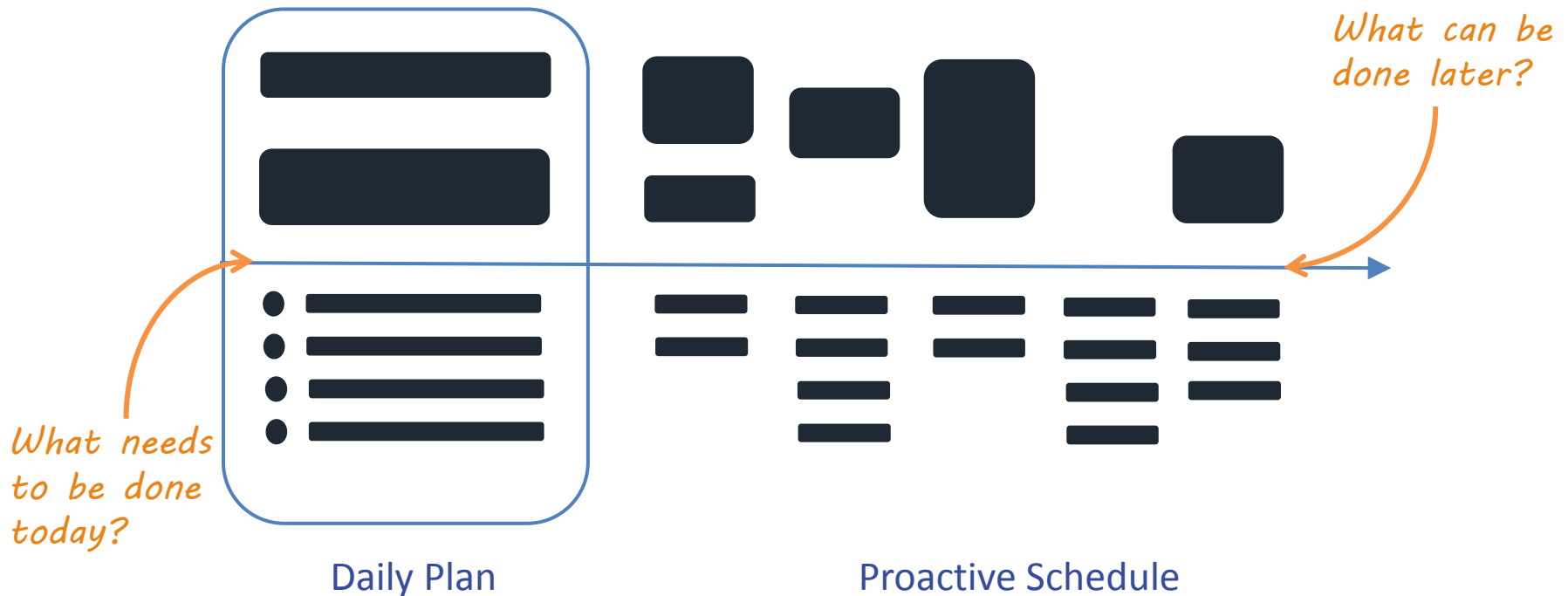
Daily Plan



# Proactively schedule your work

Proactive scheduling is the art of getting the right work done at the right time. Not too early, not too late. It balances your 'fixed' schedule of meetings with your 'flexible' schedule of priorities, and spreads these activities over time. This is a technique that many of us already use with our meeting workload. The same technique can be successfully applied to our tasks and priorities, but in a more flexible way.

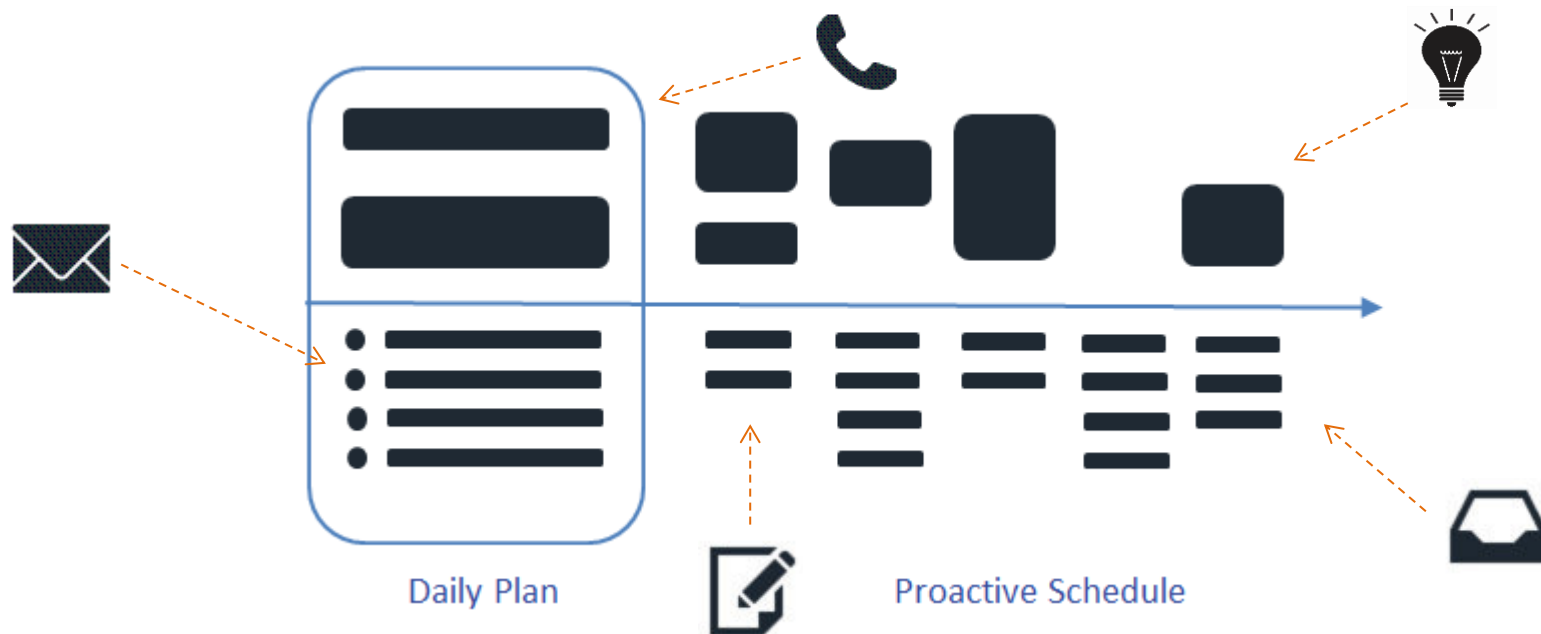
Proactive scheduling is a critical strategy for working in the proactive zone.



# Centralise everything

Work comes at us from all direction, in many different ways. Emails, phone calls, interruptions, meeting actions, thoughts, delegations, paperwork. Some of this work needs instant attention, but most can be done in a proactive and timely way.

Instead of allowing work to pile up, centralise the next step action into your system. Having all of your actions centralised in one system will increase your focus and proactivity, as well as reduce your stress levels. Things will no longer slip through the cracks, and you will find your work being driven by importance more than just urgency.



“ Failing to plan is planning to fail. ”

Alan Lakein

# 13 strategies for managing actions

The following strategies will help you to stay on top of your actions.

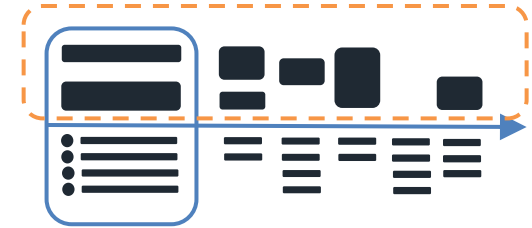
Having a centralised and prioritised action management system will help you to get the right stuff done in a timely way.



# 1

## Manage fixed work

'Hard' schedule fixed work into your calendar



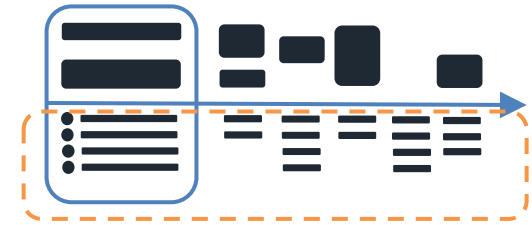
Fixed work is any activity that must be done on a specific date and at a specific time. Meetings are probably the best example of fixed work. They are fixed in time due to the fact that multiple people need to meet at the same time and in the same place. They have a specific start and finish time, so are both date and time specific. You may also have some task workload that must be done at a specific time, which would also be classified as fixed work.

The Calendar in MS Outlook is the best tool for managing fixed work, as it has the capability of scheduling work in a date and time specific way. It also allows us to collaborate with others effectively.

1. All meetings should be visible in the one central calendar
2. Don't overschedule your time with meetings – leave room for other work
3. Hard schedule larger tasks into your calendar to protect your time and reduce procrastination

# 2

## Manage flexible work



'Soft' schedule your flexible work into a date specific task list

Flexible work is any activity that can be done any time before the due date. This covers most task type activities, as tasks usually just involve ourselves and may have a deadline, but the decision around when we actually do the activity is up to us.

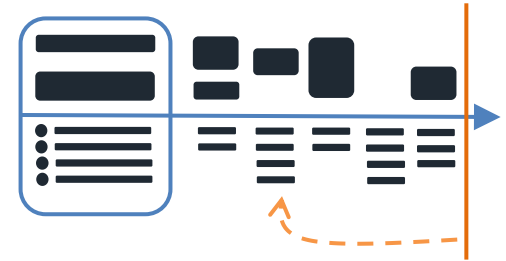
The task function in MS Outlook is a fantastic tool for managing flexible work, as long as it is set up in the correct way. Your task list should allow you to schedule actions in the future, knowing they will show up exactly when you need them to.

1. All tasks should be visible in one central task system
2. The task list should be date specific, so you are seeing the work when you need to
3. Achieve focus by using a daily plan which only shows the meetings and tasks you need to work on today

# 3

## Schedule the start

Keep your eye on the due date, but manage the start date



Most task management systems focus on the due date, as this is the critical moment when work must be completed. The inherent problem with this is that too much focus on the due date means we often leave things until the last minute. Manage the start date well and you'll find more work will be done at the right time.

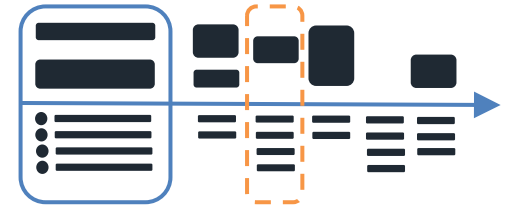
When scheduling actions, think about the due date but be sure to schedule an appropriate start date in the proactive zone.

1. Identify the due date or deadline
2. Schedule the action proactively on the date you would like to start working on it
3. Consider the complexity – the more complex the task, the longer the lead time should be
4. Also consider your other commitments and choose a date when you have capacity
5. Allow some 'wiggle room' in case you cannot get to the task on the scheduled date

# 4

## Balance your work

Balance fixed and flexible commitments



Your day is made up of both fixed time commitments such as meetings, and flexible activities such as tasks. These two types of work need to be balanced if you are to achieve your outcomes in a timely way. There is no point having 7 hours of meetings and 10 hours of tasks scheduled for the same day.

Create balance by putting a realistic and achievable daily plan in place each morning (or before leaving the night before).

1. Monitor the amount of available time for tasks outside of your meeting commitments
2. Review the tasks that are scheduled for action today, including overdue tasks
3. Reschedule, delegate or dump any tasks that are not achievable or critical to today
4. When proactively scheduling tasks for future dates, consider your capacity



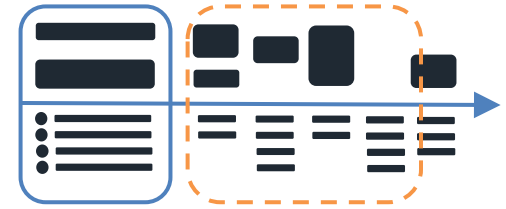
“ Productivity is never an accident. It is always the result of a commitment to excellence, intelligent planning and focused effort. ”

Paul J Meyer

# 5

## Work the proactive zone

Do your work in a timely way



In today's email driven workplace, it is easy to just react when work comes in to us, or at the other end of the spectrum, delay and leave it until the last minute. These are both reactive scenarios, and lead to lower quality work and higher stress levels. Proactive scheduling is all about reacting when necessary, delaying when there is no choice, but doing most of work in a planned and proactive way.

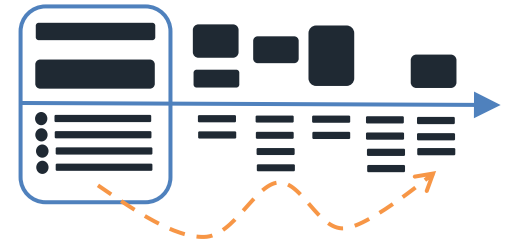
Doing work in the proactive zone is less stressful, ensures better quality and allows more timely delegation if necessary.

1. Schedule firm dates for work that should be done on a specific date
2. Schedule 'for consideration' dates for more discretionary actions
3. Link the resource of time to your activities
4. Manage your work in front of you so you can control it

# 6

## Next steps only

Create traction by scheduling doable next steps



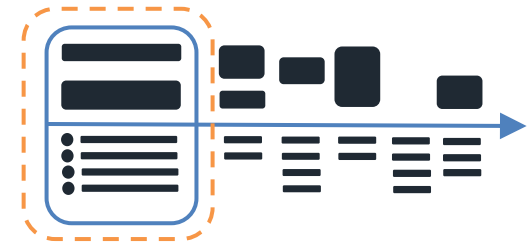
To reduce procrastination and improve traction with your work, always schedule the actual next step with every piece of work. Rather than putting a project or a complex piece of work into your calendar or tasks, ask yourself what the actual next step is with the piece of work, and schedule that.

1. Schedule the actual next step to get a piece of work started
2. Once completed, schedule the appropriate next step
3. Remember that the next step might be a task, a meeting or something due back to you
4. All large endeavours are just a series of next steps
5. The first step for most projects is to plan the project

# 7

## Create a daily plan

Get focused every day by planning the day ahead



How productive you are each day depends on your ability to focus on the activities that most deserve your time and attention. You don't have time to do everything – you only have time to do what counts. Creating a daily plan sets your intent for the day, and creates focus within the chaos.

Your plan should be made up of your meeting commitments as well as a list of task priorities for the day. It should be focused, achievable and balanced.

1. Identify how much of your day is taken up with meetings
2. Estimate the discretionary time available for tasks and priorities
3. Prioritise your task list for the day, rescheduling anything not critical or achievable
4. Plan your work and work your plan
5. Update progress by marking tasks complete, or scheduling appropriate next steps

# 8

## Use scheduling horizons

Manage the overwhelm by using 'for consideration' horizons



You are likely to have a lot of lower priority actions that just need to get done whenever practicable. These non-critical actions could end up diluting your tasks list if they are all just scheduled for arbitrary dates in the next week.

Use the first day of next week, or the first day of the month as a place to schedule actions for consideration in that timeframe. That way, if you have something on your list that is just not a priority for this week, you can schedule it for consideration next week.

1. Try to keep your priority list for this week focused on real priorities only
2. At the start of each week or month, evaluate the 'for consideration' list
3. Specifically schedule any tasks that have now become priorities
4. Reschedule any actions that are still not priorities
5. Consider dumping anything that is no longer relevant

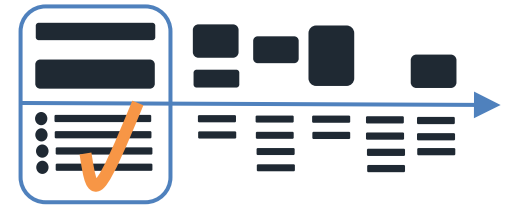
“ Everything we do in life has its own opportunity cost. From all possible things we could be doing at a given time, determining which one is of the most value to us tends to be our biggest challenge in terms of allocating our time resource efficiently. ”

Fausto Gil

# 9

## Update your progress

Increase focus and motivation by updating your progress



In today's hectic workplace, a sense of progress can be hard to come by. Yet research has shown that this is one of the most important keys to motivation. So to keep yourself motivated and clear about what still needs your attention, always keep your progress up to date.

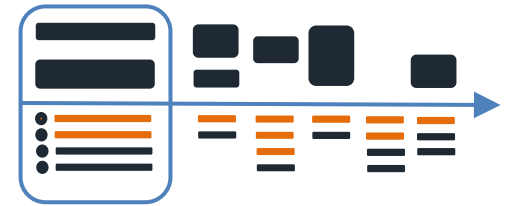
This means marking tasks complete when you finish them, scheduling next steps if there is one, and rescheduling actions that can not be completed today.

1. When working on your task list, mark items complete when they are done
2. If you complete a task, and there is a next step, recycle the task and schedule it forward
3. Try to end each day with at least 80% of your task list completed
4. Don't let tasks just roll from day to day – take control by either doing or rescheduling them

# 10

## Sequence by importance

Sequence your task list from most critical to least critical



Every piece of work on your plate has some level of urgency and some level of importance. These measures combine to create a level of criticality in your day. To gain real focus on the most critical, sequence your task list from most critical to least critical.

In the To Do Bar in MS Outlook, you have the ability to drag tasks into the order of execution that you would like. You also have the ability to set up rules to highlight 'High' priority tasks that represent must do priorities for the day.

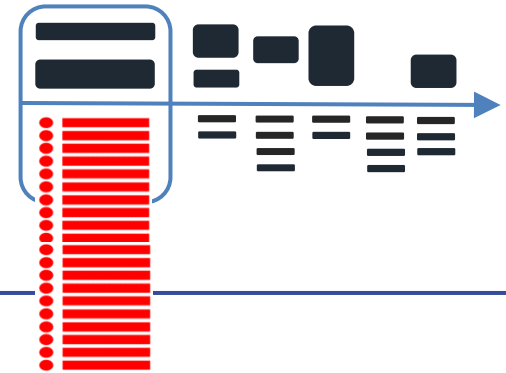
1. Set tasks as *High* priority if they are critical to the day (Commitments that are especially urgent or high value)
2. Sequence your task list from most critical to least critical each day
3. Reschedule anything that is not critical or achievable today
4. Continually evaluate new incoming priorities against this list and work out which are the most important
5. Go beyond just looking at the urgency – evaluate the importance first, then the urgency



# 11

## Managing rolling tasks

Don't let incomplete tasks roll from day to day



One of the features of the MS Outlook To Do Bar is that incomplete tasks roll forward to the next day and show up in red. This is great as it means you can't leave them in the past. The downside though is you can easily just end up with a big red pile of rolling tasks. As a result, we lose focus, priority and intent.

If you want your task list to keep you focused, you need to keep it focused. Reassess your priorities each day, and reschedule any non-essential tasks to a more practicable date.

1. Keep your task list focused on the priorities of the day
2. Your daily plan should be achievable (with a bit of a stretch)
3. At the end of the day, reschedule any incomplete tasks to the next appropriate date
4. Evaluate new incoming priorities against your plan, and only change direction if they are more important than your existing planned tasks

# 12

## Work like a chef

Develop productivity rituals that increase productivity



Top chefs are talented, creative but most of all disciplined. They build rituals in the kitchen that allow them to produce great results under intense pressure. One of these is the discipline of preparing first, then cooking and lastly cleaning up afterwards.

What a great analogy for how we should approach all work, including meetings, projects, tasks and of course, our day!

1. Start the day with some preparation (focus your daily plan)
2. Work your plan and tidy up as much as you can as you go (update progress)
3. Clean up at the end of the day (reschedule any incomplete actions)
4. Go home feeling in control and satisfied after a good day's work

# 13

## Be driven by your plan

Reduce distraction by focusing on your planned work



Email has not only changed the way that we communicate, it has fundamentally changed what we focus on when at work (and sometimes outside of work). The most viewed screen on most computers is the inbox. But when we are using the inbox to drive our work, we are actually looking at everyone else's priorities.

We need to shift that dynamic to focus on our own priorities. Create a daily plan view in MS Outlook and make that the screen that we most often refer back to. Then you will be driven by your priorities, and will get more of the right work done.

1. Put your daily plan in place and constantly refer back to it through the day to see what's next
2. Update progress as you go by marking tasks complete and scheduling next steps
3. Add new incoming priorities to your plan if necessary
4. Check your email regularly, but don't live in the inbox

# Adapt Training Solutions

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Helping the individual to improve their productivity in isolation can only have limited benefit if those around them aren't also working smarter, so we offer solutions for organisation-wide education through to individual training and support.

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