Time Management for State Advisors

# Three Big Ideas

1. Way to Collect Input
2. List to Capture & Organize Actionable Items
3. Weekly Review

# Ways To Collect Input

* Important to have a way to collect all input (to do’s, notes, materials, etc.)
  + This can be a physical inbox, email inbox, folder in your briefcase/purse for traveling days.
* This keeps items in one place vs scattered between pockets, purses, mixed in with files of reference materials, desk, bathroom counter, etc.
* All things that need some decision made must go into the “in-box” so that processing decisions can be made later.
  + Process all inboxes regularly (daily or every other day is desired) and determine what needs to be added to the list.

# List to Capture & Organize Actionable Items

* Items are added after processing your inbox.
* I like to sort items by context, based on what resources and/or where do you need to be to accomplish this task. It doesn't make sense for me to see items on my to-do list that I can only do when I am at my desk when I am on the road. I would love to only see calls I can make and tasks I have determined I could accomplish while on the road. So, my contexts are:
  + Anywhere (I have qualified this as a task I can complete no matter where I am because I always have my computer and Internet)
  + Calls (all calls I can make go on this list- perfect for when I am on the road)
  + Home (I work from home, so these are tasks that I can only do if I am at home and need the resources that are at my house that I cannot carry around when I travel)
  + Errands (I add groceries I need to purchase, things I need to buy, etc. so that when I am out and about, I can get them and don’t have to remember)
  + Agendas (I have one for each of the regular people I communicate with and add items of discussion with them to their own list rather than calling them, texting them and emailing them with every question)
  + Waiting For (This is where I track things that someone else said they would send me or do for me - makes follow-up great)
  + Someday Maybe (This is my list for lofty ideas or things I want to do but I know it's not realistic to accomplish in the immediate near future)
* Caveat - Most of our “to do list” items are ACTUALLY projects. Projects are anything with more than 1 step. Ex: “Recruit SLC Judges” may be on your to do list but this is really a project. I recommend keeping a Projects list (the actual next action steps would go within one of the Context Lists above.). When you add a project, add it in the form of the project outcome like “SLC Judges Recruited”.
  + Then, determine what is the very next action to accomplish this outcome. Ex: Maybe it is send judge letter to potential judges. But, do you have the information you need to complete that judge letter? Maybe you need last year’s packet before you look at this year's pack. Maybe you need to email your event coordinator to get the actual time frame and room names for your judge orientation. If so, that is the actual next action to add.
* If any task (within a project or not) is 2 minutes left, do it now. If not, add it to the list within a context.
* I put any materials that go along with an action in a folder called “Action Support” so that I can easily reference it when I get to that action. I bring this folder with me when I travel. Now, I am all electronic. I use Evernote and all paper is scanned in using the Fujitsu Evernote Edition Scanner. But, I used to use the actual folder.
* Reference Files - this where where items go that are reference materials, such as items you get from SAM that are not actionable, but you want to keep them for later reference. I recommend a drawer, bookshelf, etc. to keep these items so that when you come back home from trips - it is easy to put them in their spot rather than stacking on your desk.

# Weekly Review

* This is the glue that keeps everything together. This allows you to TRUST the system. Without a trusted system, you will not actually use it.
* The weekly review is your time to look at all of your lists (by context) and projects to determine if you’ve already done something and forgot to check it off, maybe it triggers a reminder to add something else to your list, etc.
* I highly recommend to SCHEDULE this. I do mine at 2pm every Friday and schedule 2 hours for this. I turn off email notifications, phone and text, etc. so that I can fully focus on reviewing everything completed and done.
* Once I review my inboxes, process everything and look through the lists, I then look at my Projects to ensure there is a next action on my lists to keep the project moving along.

# Technology

* It is important to first determine your system for managing inputs, projects, actions, etc. (above) AND THEN find the technology to work for you. I personally use OmniFocus 2 but I think that is a Mac specific program. I like it because it syncs automatically to my Apple Watch, iPad Pro, MacBook, etc.
* Using this software allows me to easily capture inputs, ideas, etc. on the fly and keeps all the projects and their next actions tied together.

# Tips

* Complete your inbox(s) review regularly - daily is ideal.
* Do not add items to any of your lists (except Someday Maybe) unless you have all of the resources you need to complete the action. If you are waiting for someone to send you the file, it goes to Waiting For, but the next action you would complete
* Schedule time for your weekly review and cut out distractions.