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Hurried, Harried & Harassed: Time & Task Management System Training

North Orange County Public Safety Task Force

Capacity Building Workshop Series

Is Your Hair on Fire?

We've been conditioned to believe that success in business is only attained by "burning the midnight oil" or "running around with your hair on fire;" forsaking the things that bring balance to our lives. Our physical health, family relationships, friends and creative pursuits are all subordinated to the erroneous notion that the workday never ends. The cruel irony is that while we're working harder, we're often falling further behind, perpetuating a vicious cycle. We turn around one day to find that our relationships are strained AND our potential success at work is never maximized. I know. I've been there.

Years ago, I was surrounded by stacks of paper, sitting at my desk nearly every day until well after darkness fell and dreading coming in the next day to find the same stacks of work as the day before. Something had to change. I went on a hard target search for systems that worked in managing tasks and allowing me to live a happier, more successful life at home and work. After reading many "time management" books, I discovered one called "The Organized Executive," by Stephanie Winston. Her book caused me to think about this issue differently, but I found nothing that was specifically geared toward the nonprofit sector, where there could be no expectation of generous helpings of administrative support. We don't have the luxury of delegating tasks and responsibilities because there is seldom someone to whom we can delegate. So, I amalgamated Winston's approach, along with others into a system that I have used, and taught others to use, since. This workshop reflects that approach and I hope you'll use the information to make changes necessary to achieve phenomenal success at work and balance in your personal life!

Additionally, in the nonprofit sector, you're not afforded the luxury of inefficiency. If Apple loses \$25,000 a day due to inefficiency, it doesn't even amount to a rounding error. For us, though, \$25,000 could mean the difference between success and failure. The onus falls upon us to conduct our work in as ruthlessly efficient a manner as possible. The extent to which you're able to recapture dollars through increased efficiency will allow more resources to flow to your mission. I've adjusted my mindset to consider project management and task management as fundraising activities. Competently managing projects and tasks also gives you an edge on your competitors.

The basis of this system is what Stephanie Winston calls "TRAFing."

What is TRAFing?

It's a task/time management system that allows users to keep projects moving and avoid paper/email/voicemail from piling up by planning tasks in one-week intervals. TRAF stands for:

Toss
Refer
Act

File

TRAF refers to the actions you'll take with every piece of information that comes across your desk. You'll toss it, refer it, act on it or file it, thus ensuring that tasks never become backlogged.

What materials will I need to make TRAFing work?

Although the system can be modified to fit your style, it works best with the following items:

- A task organizer (such as the Microsoft Outlook Tasks function)
- An appointments calendar or equivalent
- A large, blank task calendar for your desk or equivalent, and/or a Daily TRAF Task List Template
- A physical in box
- An open vertical file close to your desk
- File folders and filing cabinet

A Step by Step Guide to TRAFing

Step 1: Get organized (or, How do you eat an elephant? One bite at a time.)

This is the hardest step and will require you to set aside quite a bit of time for initial set-up and clean up. When I started using this system, I set it up on a weekend so that I could focus only on this. The amount of time you spend on this step depends on the level of disarray in your workspace (both physical and virtual). You need to learn two words and chant them over and over for this step to be successful: TOSS IT! Say it again...it's okay...you are going to throw a bunch of things away. I would suggest the following process to get set up:

1. Go through every item currently on your desk, in your email and in your voice mail and toss/delete what you absolutely don't need (you'll organize what's left later)
2. Go through all of your hard copy files and email archives and toss/delete what you absolutely don't need. Now, didn't that feel good?!
3. Now, write the following words on separate file folders (or boxes if your workspace is really a mess!): Refer, Act and File.
4. Revisit your email in box and as you go through them, assign a category (Refer, Act or File). If Refer, simply forward the email to whom you are referring. Set up an "Act" email file folder and move all items you need to act on into it. For emails you need to keep as a record, set up as many archive file folders corresponding with the program or subject, and move relevant emails into those folders.
5. Now, revisit your hard copy files and email archive and do the same.
6. You are now ready to set up your hard copy, non-active files (you should have much fewer by now).
7. Try this rule of thumb: If you haven't actively used a piece of information in the last month, file it. You've already tossed what you don't need at all.
8. Clearly mark your non-active file folders with dates and easy to understand headings (Example: Golf Tournament 18 or Scholarship Program 18) and file everything you placed in the File folder appropriately.
9. You now have the basis from which to set yourself up for weekly TRAFing. You should never have to revisit this step again!

Step Two: Set Yourself up for Weekly TRAFing (or TRAFing Feng Shui)

You'll now need to arrange the materials, work environment and resources necessary to keep up with weekly TRAFing. I suggest the following steps:

1. Pick the day of each week that you'll TRAF.

2. Set aside at least an hour in your appointments calendar on the day you choose each week. You **MUST** take appointments with yourself as seriously as you do with others for this system to work. Start now!
3. Set up your in box, desk Task calendar/Daily TRAF Task List and open vertical file in close proximity to your desk.
4. Create a file folder titled "Calendar/Materials" (this is a super important file!) and place it in the front of your vertical file. and a "Good Ideas" folder (preferably on your computer desktop).
5. Create file folders for every project you're currently working on (Example: Bank Dispute 19 or Marketing Plan 19) and place them in your vertical file where they're easily accessible. Name your computer files the same as your hard copy files.
6. Familiarize yourself with the tasks and calendar functions on whatever program you use.
7. Transfer all appointments from any other calendar to whatever single appointment calendar program you use.
8. You are now sufficiently set up to TRAF!

Step Three: TRAFing for the First Time (Don't be afraid!)

Your first time TRAFing will be much more involved than subsequent times, because you're going to have to plow through all the stuff you just cleaned up. I suggest the following process:

1. Grab the files you marked Refer and Act and move all of their contents into your in box.
2. Go through any mail, reports, memos and either toss them or place them in your in box.
3. Go through all your emails and texts and either delete, refer to someone else or print out (optional) and place in your in box.
4. Go through your voice mails and either return short calls immediately or transcribe the message and contact info and place in your in box. Delete dead voicemails!
5. Your in box should be bulging by now...it's okay...it's only temporary.

Now begin going through your in box but remind yourself that you are going to ask the same questions of every piece of information you pull out:

Can I Toss it? If yes, DO IT!

To whom should I Refer it? Once determined, write the person(s) name and a note on the item and set it in a Refer pile. Once you're done with your TRAFing, route everything to the appropriate people.

Can I Act on it in less than five minutes right now? If yes, DO IT!

Does it need to be Filed? If yes, DO IT!

Look how much you just accomplished!

You should be left now with only those Act items requiring longer than five minutes to complete. So how do I do that, you ask? Stay with me...

6. Pull up the Tasks function on Outlook or whatever program you're using.
7. Pull out the first Act item left in your in box and write the action item in the Task list. Continue with all the rest of the items until there is nothing left in your in box.

Optional: You can code certain tasks to projects by assigning different color codes to them or by segmenting them by project.

8. Review each item and assign a 1 or a 2 to each. 1 items must be completed within the next six days. 2 items don't have to be completed in the next six days.
9. Place all 2 items back in your in box. You'll TRAF them again next week.
10. Taking into account your appointments over the coming week, review your Task list and write each 1 item on your Task desk calendar on the day you'll get it done or Daily TRAF Task List, checking it off on the Task list as you go.
11. An important tip: Make sure you schedule "blank space" as you allocate time for the week to accomplish your tasks. Blank Space is time you set aside filled by nothing specific. As you know, during the week, urgent things pop up that require your attention. By setting aside Blank Space, you have slots of time to deal with these things, without sacrificing progress on your regularly scheduled tasks. Plus, if no urgent issues arise, you have pockets time for thinking, brainstorming, helping colleagues, developing your next billion-dollar idea or relaxing!
12. Once all Task list items have been checked, you know what you will accomplish every day for the next week.
13. Grab all the documents needed to complete 1 items and mark them at the top with the date they will be completed and place in your "Calendar/Materials" file.

Step Four: Daily TRAFing Activities

As you work through your week, more items of information will come into your office in the form of emails, texts, voice mails, reports, memos and documents to review. Because you're now so organized and have each day's tasks planned out, you'll be able to discern whether something is absolutely pressing, or whether it goes in your in box to be included in your next weekly TRAFing session. I suggest the following on a daily basis:

1. When you get into the office, immediately transcribe voice mails and delete, check email and delete any you don't need or respond to those you can do in less than five minutes.
2. Open your Daily TRAF Task List Template.
3. Grab your "Calendar/Materials" file and pull out anything you have marked for completion that day.
4. Add your items to be completed that day on to your Daily TRAF Task List.
5. Determine the logical order in which you'll complete your tasks.
6. Complete your daily tasks, marking them off as you go. Commit yourself to never leaving the office until you've crossed off each daily task!
7. By the end of the day, you should have crossed off everything listed for that day.
8. Repeat the same process the following day...and the following day...and the following day...get it?

Some Words of Advice

- Resist the temptation to plow through your in box between TRAFing sessions. Take comfort in the fact that you'll go through it completely each week.
- Keep a copy of your strategic plan, operational plan, individual workplan, and current project management plans and any timelines in your in box, so you can include them in your TRAFing each week.
- Stick to this process closely in the first 30 days before deviating and modifying. Something that seems like overkill now might make more sense once you're more organized. Once you have the system down, feel free to modify to meet your needs, but stick to the basic principles. Also, let me know if you make any

modifications that seem to really improve the system. I've made changes before based on this feedback (such as the Daily TRAF Task List Template)!

- Resist the urge to respond to non-crucial emails, texts, social media messages/posts and voice mails right away. Your email in box should be treated just like your paper in box. The "Under Five Minutes" rule rules! One trick I've learned is to turn off any noises alerting me to new emails, texts and voicemails. No beeps. No Game of Thrones references. Nothing!
- Never lose a good idea, but don't obsess about it. Jot down your idea and place it in your "Good Ideas" file, along with any information, such as articles, blog posts, presentations. Put yourself on a schedule to review it once every couple of months.
- Keep files moving through the process. For example, if I have a file in my vertical files marked "House Raffle 18," once the project is complete, I will go through that file and toss any unnecessary info and then file it for reference or posterity. In any event, it's out of my office! For multi-year projects, I would replace it with "House Raffle 19."
- Technology is a tool...not a way of life! Work with your colleagues to create group norms around social media, texting, on-line collaborative tools and other ways that we are all so readily available to one another these days. These tools can enhance our lives if we use them respectfully and properly. They can make us feel set upon, taken advantage of, hounded and boundary-less if we don't harness them and use them in the right context. I urge organizations to make the effort to develop policies and procedures around the use of these tools to avoid unduly pressuring employees to work during non-work hours.
- I strongly encourage you to include personal and family activities in your weekly TRAFing. I include planning family vacations, setting doctor's appointments, taking the dog to the veterinarian, calling the plumber and many other things...even asking my wife out on a date! Doing this will help you achieve balance in your life. It helps me truly focus on work when I am scheduled to do it...and more importantly, focus on family, friends, hobbies and volunteer work fully while engaged in those activities.