

Clarity – The Key to Time, Life & Project Management

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Time Management for Independent Professionals

As independent professionals working with many clients simultaneously, it's easy to become overwhelmed with everything that has to be done.

I've found that overwhelm is usually caused by two things – complexity and lack of clarity.

There are so many time management systems available. I've tried everything – literally. I've done it on notepads, computers, PDA, assistants, and just about every planner and method available – you name it.

I've found that just about every time management solution or system is too complex. And complexity is the enemy. We become confused and overwhelmed with too many possibilities and choices. Simplicity and Clarity is what we need. Clarity is what gives us power to focus on what really matters and say no to what doesn't. Simplicity lets us *stay* focused.

For years I bought into the notion that if I could just get everything into one place, plan a little better, and have a great system for tracking, nothing would fall through the cracks and I could do everything.

Wrong.

Organizing a bunch of “junk” only results in organized junk.

The planning systems, programs, tools, etc. all seem to work a little backwards. They take a *huge* number of things and help you to organize them and prioritize them. The problem is, the majority of that stuff just doesn't really matter.

It should be just the opposite. Take a *few* things that must be done all the time and make sure they get your time and energy until they're done and make sure nothing else gets in the way.

If everything else is put off or forgotten, who cares? Would you really feel bad if you couldn't do something less important than the few things you've identified as the most important?

There really is no distinction between your “personal life” and work – or anything else for that matter. Your life is your life. This is what I do.

1. Write down the five (or six) main categories in your life. These are the key areas that you’ve made strong, meaningful, long-term commitments. These are the critical areas of your life that must get your attention. If one suffers, they will all suffer. Here are mine (in no order of importance).

1. Work
2. Family
3. Boy Scouts
4. Church & Spirituality
5. Marriage & Me.

You may think that Boy Scouts perhaps isn’t *that* important - at least not as important as the others. We’ll this is an example of a “real” long-term commitment. I promised I would be a scoutmaster for five years. It would be easy to say “not this week” and put it off ‘till later, but I won’t. All of these areas have permanent, non-movable places on my calendar. I don’t even have to think about what I’m doing during these times. They are immovable. These are the areas of focus that take precedence over *all* else. They give me clarity and permission to say no to all else.

2. For each of these categories you need to be clear about the purpose, the goal. The answer to the question “why? What’s the point?”

If you don’t have the why, then all the tasks you could do are really meaningless busywork.

- 1) **Work** – To maintain financial security. (that’s really the only purpose, isn’t it?)
- 2) **Family** – To create a warm, secure home atmosphere with well adjusted, and well rounded kids.
- 3) **Boy Scouts** – To give Taylor (my son) and the boys valuable, life-changing experiences that they will never forget.
- 4) **Church & spirituality** – To have the constant influence and blessings of God.
- 5) **Marriage & Me** – To have a fun, loving and deeply personal relationship.

The answers to these questions then give use a basis for the next step.

3. For each of the categories, now write down three things that you have to do regularly in order for the “why” to happen. Example: What do I need to do regularly to achieve financial security?

1) **Work** – Why? To maintain financial security.

1. Marketing, networking & relationship building.
2. Client service - Define clear roles, deliverables & payment terms – then do the work knowing that my “o.k.” is someone else’s “incredible.” Choose in advance which things have to be “perfect” and which can be “good enough.”
3. People/Project Mgmt – Coordination & communication. Follow-up, communicate, follow-through.
4. *Administrative – billing, reporting, accounting. (outsource)

2) **Family** – Why? To create a warm, secure home atmosphere with well adjusted and well rounded kids.

1. Clean, organized, and repaired home.
2. Fun, memorable activities with my children.
3. Give the kids responsibilities and rewards.

3) **Boy Scouts** – Why? To give Taylor (my son) and the boys valuable, life-changing experiences that they will never forget.

1. Fun and organized meetings & activities.
2. Monthly camping.
3. Unusual & “cool” things to learn and do.

4) **Church & spirituality** – Why? To have the constant influence and blessings of God.

1. Church & temple attendance.
2. Personal and family prayers with scripture study.
3. Family home-evening each Monday night.

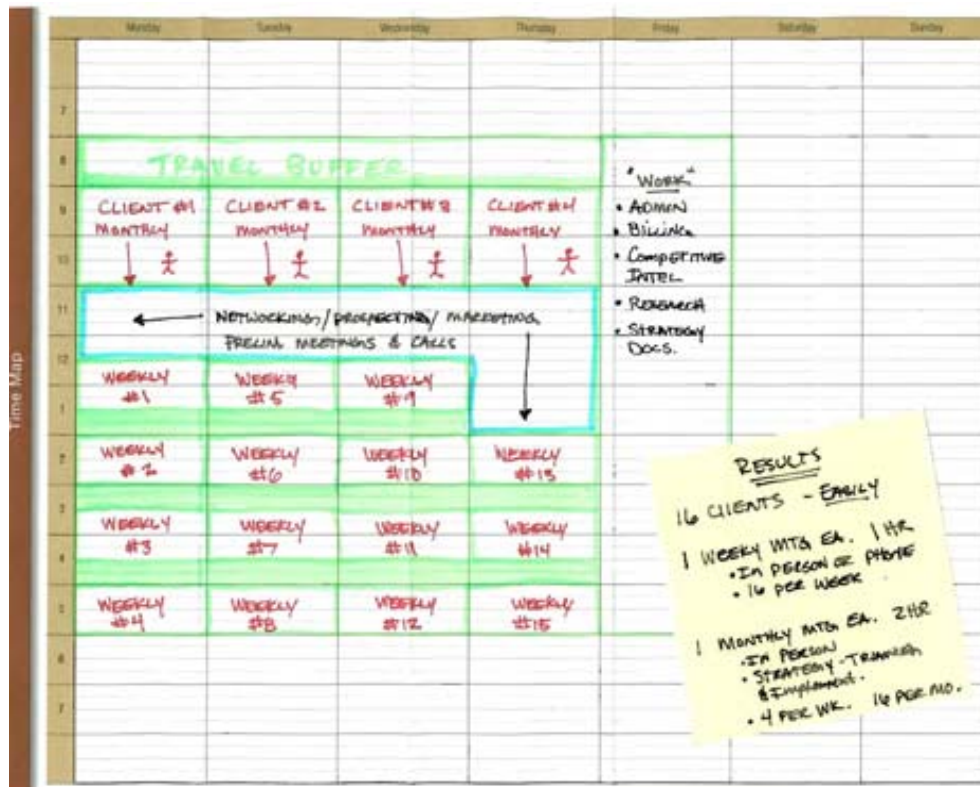
5) **Marriage & Me.**

1. Time alone – by myself and together.
2. Physically fit.
3. Support and lighten the load of my wife.

4. Make a Time Map

One of the most useful things I have ever done was to map out my ideal day. The kind of day that fits all of the important things and still leaves plenty of room for unexpected delays, fun, or just time to stop and do nothing.

A Weekly planner/calendar in columns is the best way to create a time map.



[Example time map]

My Preferred Planner/Calendar Format

I've used many planner formats and the one that works the best for me is the weekly calendar on two pages with each day in a column. This lets me see the entire week at once – and how everything relates to each other.

The daily formats provide a lot of space to write things, but it's hard to see what's going on easily. This is the same problem with electronic PDA's.





Franklin Covey has the Compass wire bound planners in weekly format – with 30 minute time slots. If you want 15 minute time slots you'll have to go with another brand.

Example on next page..



[Franklin Covey's Compass Planner – Weekly Format]

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	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7							
8	TRAVEL BUFFER						
9	CLIENT #1 MONTHLY	CLIENT #2 MONTHLY	CLIENT #3 MONTHLY	CLIENT #4 MONTHLY	<p><u>"WORK"</u></p> <ul style="list-style-type: none"> • ADMIN • BILLING • COMPETITIVE INTEL • RESEARCH • STRATEGY DOCS. 		
10	↓ 	↓ 	↓ 	↓ 			
11	← NETWORKING / PROSPECTING / MARKETING PRELIM MEETINGS & CALLS						
12	WEEKLY #1	WEEKLY #5	WEEKLY #9				
1				↓			
2	WEEKLY #2	WEEKLY #6	WEEKLY #10	WEEKLY #15			
3	WEEKLY #3	WEEKLY #7	WEEKLY #11	WEEKLY #14			
4							
5	WEEKLY #4	WEEKLY #8	WEEKLY #12	WEEKLY #15			
6							
7							

RESULTS

16 CLIENTS - EASILY

1 WEEKLY MTG EA. 1 HR

- IN PERSON OR PHONE
- 16 PER WEEK

1 MONTHLY MTG EA. 2 HR

- IN PERSON
- STRATEGY - TRAINING & IMPLEMENT.
- 4 PER WK. 16 PER MO.