



# Time Management

# Time Management

## Resources

People

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Time

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## Workshop

What are your own personal time bandits?

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Key techniques that will allow you to manage time are:

- Time Locking
- Batch Processing
- Task Prioritization
- Planning



## Time Locking

There are two rules when Time Locking:

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Workshop

What are some guidelines that can help make Time Locking work in your situation?

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## Batch Processing

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## Workshop

List those activities that you feel you could Batch Process.

|       |              |
|-------|--------------|
| _____ | <b>D M W</b> |
| _____ | <b>D M W</b> |
| _____ | <b>D M W</b> |
| _____ | <b>D M W</b> |
| _____ | <b>D M W</b> |
| _____ | <b>D M W</b> |
| _____ | <b>D M W</b> |
| _____ | <b>D M W</b> |

## Case Study for Task Prioritization

Your boss comes to you and says the CFO needs tracking information ASAP, but you have a sales meeting to conduct. How do you handle this?

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## Planning

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## Workshop

1. Take a couple of minutes and review the sample Time-Managed Action Plan on page 5.
2. Then, identify all your activities and look at the items you listed in the batch processing and time analysis workshop. Which activities can be Time Locked daily or weekly? Complete the worksheets on page 6.



# Sample Time-Managed Action Plan

| Hour/Day   | Monday   | Tuesday                                       | Wednesday                                     | Thursday                                      | Friday  |
|------------|--|---|---|---|---|
| 7:30 a.m.  |  |   |   |   |   |
| 8:00 a.m.  | Conduct sales mtg  | Daily briefing                                | Daily briefing                                | Daily briefing                                | Team debriefing                               |
| 8:30 a.m.  | Attend mgr's sales meeting   | 1-1 coaching sessions                         | Scripting/ objections clinic/ sales round     | Out of office – meetings                      | Attend manager's debriefing                   |
| 9:00 a.m.  | Follow up on pending sales, critical voice- and e-mails, credit review |   |   |   | Observe & provide feedback                    |
| 9:30 a.m.  |  | 1-1 coaching or skill building session        |   |   |   |
| 10:00 a.m. |  |   | Critical voice- and e-mail                    | Coaching & play follow-up                     |   |
| 10:30 a.m. |  | Lunch   |   |   |   |
| 11:00 a.m. | Scanning   |   | Lunch   | Lunch   | Lunch   |
| 11:30 a.m. | Lunch  | Lunch   | Lunch   | Lunch   |   |
| 12:00 p.m. | Observations & Feedback  | Follow up on current play                     | Skill building sessions                       | Observations, feedback & joint calls          | Observe/ feedback                             |
| 12:30 p.m. |  |   |   |   | Observe & provide feedback                    |
| 1:00 p.m.  | Review stats & tracking, prepare for coaching sessions                 | Observe & provide feedback                    | Joint calls                                   | Observations, feedback & joint calls          |   |
| 1:30 p.m.  |  |   |   |   |   |
| 2:00 p.m.  | Batch process noncritical voice/ e-mail/admin                          | Batch process noncritical voice/ e-mail/admin | Batch process noncritical voice/ e-mail/admin | Batch process noncritical voice/ e-mail/admin | Batch process noncritical voice/ e-mail/admin |
| 2:30 p.m.  |  |   |   |   |   |
| 3:00 p.m.  | Review stats Daily debriefing  | Review stats Daily debriefing                 | Review stats Daily debriefing                 | Review stats Daily debriefing                 | Review stats End-of-week debriefing           |
| 3:30 p.m.  |  |   |   |   |   |
| 4:00 p.m.  | Daily planning   | Daily planning                                | Adjust weekly plan                            | Daily planning                                | Weekly planning                               |
| 4:30 p.m.  |  |   |   |   |   |
| 5:00 p.m.  |  |   |   |   |   |
| 5:30 p.m.  |  |   |   |   |   |
| 6:00 p.m.  |  |   |   |   |   |



# Time-Managed Action Plan

Week \_\_\_\_\_ to \_\_\_\_\_

| Hour/Day   | Monday | Tuesday | Wednesday | Thursday | Friday |
|------------|--------|---------|-----------|----------|--------|
| 7:00 a.m.  |        |         |           |          |        |
| 7:30 a.m.  |        |         |           |          |        |
| 8:00 a.m.  |        |         |           |          |        |
| 8:30 a.m.  |        |         |           |          |        |
| 9:00 a.m.  |        |         |           |          |        |
| 9:30 a.m.  |        |         |           |          |        |
| 10:00 a.m. |        |         |           |          |        |
| 10:30 a.m. |        |         |           |          |        |
| 11:00 a.m. |        |         |           |          |        |
| 11:30 a.m. |        |         |           |          |        |
| 12:00 p.m. |        |         |           |          |        |
| 12:30 p.m. |        |         |           |          |        |
| 1:00 p.m.  |        |         |           |          |        |
| 1:30 p.m.  |        |         |           |          |        |
| 2:00 p.m.  |        |         |           |          |        |
| 2:30 p.m.  |        |         |           |          |        |
| 3:00 p.m.  |        |         |           |          |        |
| 3:30 p.m.  |        |         |           |          |        |
| 4:00 p.m.  |        |         |           |          |        |
| 4:30 p.m.  |        |         |           |          |        |
| 5:00 p.m.  |        |         |           |          |        |
| 5:30 p.m.  |        |         |           |          |        |
| 6:00 p.m.  |        |         |           |          |        |
| 6:30 p.m.  |        |         |           |          |        |



## Action Plan

|           |  |
|-----------|--|
| More      |  |
| Better    |  |
| Different |  |
| Less      |  |

