
CHAPTER 1

Executive Summary



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As a reader, you may simply want to understand the steps to take in order to apply the principles you will find throughout the rest of the book.

Our clients are always looking for ways to make their processes *leaner*. This is the equivalent of an executive overview to give you the highlights of how to make the Personal Efficiency Program (PEP) work for you in the minimal time needed to absorb its principles.

I summarize these steps in this “At a Glance” chapter for those who want to get on with it without having to study in detail the full content of the book.

To understand the reasoning and philosophy behind these steps, you can refer to the appropriate chapters in the book.

Meanwhile, if you follow these steps, I guarantee work will feel less overwhelming, you will soon gain more control over your day, get more done, and feel better about your work. You may need to customize the steps to fit the culture of your organization, or its technology, or your personal work style. That’s fine. But be sure to follow the *principles* that are the basis of each recommended technique.

The PEP process begins with self-management. The questions you must keep in the forefront of your mind are: “How do I do what I do?” and “How can I do it better?”

The most common work mistake people make is putting things off that they don’t like to do—procrastination. Most of us do not procrastinate consciously. Mostly, procrastination is a bad habit. An enormous amount of time is consumed simply going over (mentally or otherwise) all the things to be done, instead of acting in the first place.

People tend to act when it’s easy to do so. The aim of the PEP process is to make it easier for you to act—in other words, to get you organized so you can act sooner.

GET ORGANIZED

To get organized, begin by purging your existing organizational structure. Clear the clutter—physical and mental.

Set aside a block of uninterrupted time. A few hours should be enough to get started.

Begin by emptying the drawer that will become your “working file” or “active drawer” so you can create organized files there. (On subsequent days, you can schedule in your calendar to continue the process on your reference file drawers).

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Empty everything from your drawers, file cabinets, paper trays, walls, briefcase, and so on—every piece of paper—and place it all on your desk. Look everywhere: under the blotter, behind the curtain, under the desk. Gather all your papers and pile them indiscriminately on top of your desk. Begin going through each and every one of the papers to sort them. Deal with them as follows:

- Pick up the top piece of paper and deal with it now in one of the following ways:
 - If it is something that needs to be done and will only take a few minutes, deal with it to completion—now.
 - If it is something to be done that might take you some time to complete, write or type it into your task list as something to be done. If you use Personal Information Manager (PIM) software, such as Microsoft Outlook or Lotus Notes, use the “To Do” function to write the task down. Your aim is to write down all the things that need to be done in one place. (When you write it down, identify what is the specific next step to be done on the task so that it is clear what you need to do next when you finally get to it.)
 - Once you have either done or identified what needs to be done with that piece of paper, sort it. If the paper reflects future work, start setting up a pile on the floor called “Working Files.” If the paper represents something that you may need to access again in the future, create a second pile called “Reference Materials.”
 - If the paper represents something that should be delegated, forward it to the correct person. (If it is something that you want to follow up on, make a note in your task list to do so.)
 - If the paper can be found elsewhere, either electronically or otherwise, and it isn’t something that you know you will need to use in the future, throw it away or shred it.

Carry on with this process, paper by paper, until the desktop is empty and two piles exist on the floor for all the Working Files and Reference Materials you intend to keep.

Next organize your Working File pile. Sort through and identify the key categories that represent the papers in your pile. It might be “Project X” or it might be a category called “Finance” and within it, a subcategory called “Budget.” Use a piece of paper to write down the names of the general categories. Chapter 3 provides a process we call

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“Responsibility Mapping” to identify key categories that represent your main job functions. You shouldn’t have more than 8 or 10 high-level categories or you will not be able to create a pattern you can easily remember. They will become alphabetical instead of subject oriented. Once you have identified the categories, create hanging folders and tabs for each, and place the “Working Files” into the drawer of the desk closest to where you sit.

Apply the same process to the pile of Reference Materials.

Now that your papers are organized, move to the computer. Your e-mail program will likely have the capability of creating folders enabling you to organize and find again those e-mails that you wish to keep. If you don’t already know how to do so, familiarize yourself with how to create folders for saved e-mail. Sort your inbox e-mail by date, and beginning with the oldest e-mail, process each as follows:

- If the e-mail can be responded to and completed within a few minutes, do it now.
- If the e-mail can be delegated, delegate it now.
- If the e-mail requires some time to process, add it to your task list, noting the specific next step required. Outlook, Lotus Notes, and other PIMs often allow you to move the e-mail into a task, in which case, do so, and fill in the parameters including the specific next step on the subject line, and a reminder if you want to be prompted to act at a certain time to do it. (Categorize the task so that you are able to sort and view new tasks by subject matter.)
- If the e-mail is something you need to keep for future reference, create a folder under the inbox (the folder name should be consistent with the folders you’ve created in your Working Files). Drag the e-mail into the appropriate folder. (These folders should only be created under the inbox if your organization has no limit on the size of files you can keep in your inbox. In many organizations there is a limit so the folder structure needs to be created in another space. You should consult with your IT department as needed to identify what that space should be. If it is a drive that is not backed up automatically, you will also need to consult with IT to establish a backup process.)
- If the e-mail is not something you need to keep for future reference, delete it.
- Follow these steps until your inbox is empty, your task list represents everything you need to do that came to you in the form

of e-mail, and your folder tree is created with those e-mails you intend to save for future reference.

- *Note:* If you have more than a couple hundred messages, you should pick a date (maybe two to four months back) and move everything older into a folder you create called “Old Mail” and just leave it there for a couple of months. You can delete the whole folder once you are convinced you are no longer going into it to find anything. Then apply the PEP e-mail process just described to the mail still in the inbox. This will make it easier and quicker for you to process what is still current.

Organize the documents on your hard drive. If you are a Microsoft user, go into “Documents” and create categories that mirror your paper files and e-mail folder tree. For documents you intend to keep, drag and drop into the appropriate folder.

At this point, your desk should be clear of its paper. The paper should be organized in a way that makes it easy to find what you need to find. Your electronic documents should be better organized than they were before. Your e-mail inbox should be empty. All of the things that you need to do should be tasked.

Your newly organized state should make it easy to act.

HABITS AND ROUTINES

The secret of success of every man who has ever been successful—lies in the fact that he formed the habit of doing things that failures don't like to do.

—ALBERT E. N. GRAY, “The Common Denominator of Success”

The single most important rule to follow when it comes to processing your work is to act on a task or item the first time you touch or see it. The mantra of PEP is *Do It Now*. Of course, not everything can be done now, and possibly not everything should be done now. Your aim, however, should be acting on the item the first time you run across it. If you are not going to do something, don't look at it. If you look at it, do it now.

A technique that can be employed to reinforce this “look and act once” concept is called *batching*. Many elements of your work can be reduced to simple routines that will let you complete similar tasks in the shortest possible time.

BATCHING WORK

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A case in point is e-mail. E-mail is not for instant communication. A visit to the office or a telephone call or, depending on the culture, an instant message, should be employed if something needs to be done instantly. Batch e-mail, that is, schedule two or three times a day to process your e-mail completely. Do not look at e-mail any other time. Turn off your e-mail alerts, and instead schedule a time (possibly first thing in the morning, then again after lunch, and finally before you go home) to view and process your e-mail completely. If your organization culture seems to demand more immediate turnaround of e-mail, this should be raised in departmental meetings because it means that everyone needs to interrupt everything they are doing continuously when e-mail arrives even if it is of relatively low importance.

When processing e-mail, follow the four Ds:

1. *Do it now.* Read, respond, and act on the e-mail to completion.
2. *Delegate it.* If it's something that someone else can or should do, pass it on to them now.
3. *Designate it.* Create a task if it's something that's going to take you some time to do. Use a calendar to schedule the task.
4. *Discard (or file) it.*

By following the four Ds you will have processed each e-mail and at the end have an empty inbox.

One more note: Most e-mail applications allow for the screening of incoming e-mail. In Outlook and Lotus Notes, you can establish "Rules" to eliminate less important messages or batch routine messages into folders that can be looked at once or twice a week, and so on. If you are getting a couple hundred e-mail messages a day this is essential.

BATCHING WORK

Analyze all of your work. Identify the things you do that can be batched such as telephone calls, e-mail, follow-up activities, paying bills, reading, routine paperwork, filing, meetings with direct reports, and any other routine functions.

Once you have established the types of work that can be batched, set up simple routines in your schedule to act on these batched activities.

You are now organized so that it's easier to act, find things, and get things done. You have a complete list of all your to-do activities.

You have established routines to process work in a more organized (batched) way. The next step is task management or planning.

PLANNING

People tend to act when they have a clear picture (idea) of what it is that they need to do. The purpose of planning is to provide you with clear pictures.

The components of *planning* include:

- Having clearly stated goals and objectives;
- Breaking down into specific tasks the steps that will lead you to the accomplishment of your goals and objectives;
- Managing tasks—consistent review, prioritization, follow-up, and follow through; and
- Rebuilding the plans that failed to meet the goals and objectives and persisting until you achieve them.

My advice is to establish a routine time in your calendar once a week to go through all of your outstanding tasks and identify which ones need to be done and or progressed in the next week. Compare these tasks to your calendar activities for the next week, other scheduled activities (meetings, etc.), deadlines that must be met (or milestones to those deadlines) and estimate how much time you can devote to your tasks in the upcoming week. Prioritize the items that need to be done and identify your list of tasks for the upcoming week. We call this *Weekly Review and Action Plan* (WRAP).

If you find yourself hesitating on a task or project, you probably don't have a clear idea of what it is that needs to be done. Break the task down into its smallest possible components. Pick up the first thing that you need to do and note that down in your weekly task list.

If you have staff who report to you, keep in mind tasks you have delegated don't necessarily get done simply because you ask to have them done. Typically you need to follow through on things that you've delegated, items that you're waiting for, and so on. Part of your task list for the new week should include a follow-up of those tasks you have delegated to make sure they get done.

Finally, expand the use of your calendar. If you want to get something done, schedule it. This is an old and proven time management rule. Too often, people's use of a calendar is limited to scheduling

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meetings/appointments. Your calendar should also include reminders, deadlines, and milestones. Schedule time in your calendar to do your most important tasks.

CONTINUOUS IMPROVEMENT OF THE PROCESS (KAIZEN)

Continuous improvement is the philosophical basis for PEP. The time-tested steps in this chapter can improve how you do what you do. It is possible your exact situation may not be reflected in these steps. That does not matter. The real outcome of PEP is not necessarily a neat person, or even a better-organized or more efficient person. Nor do you have to follow these steps to be successful in your work. The important outcome of PEP is making continuous improvement of your personal work processes part of your everyday activities.

So, if you find a part of your work at all difficult or problematic, ask yourself how you can do it more easily the next time and act immediately on the answer to that question.

Most of us manage to do our work one way or another. Whether we are managing it in the most efficient or effective way possible is the question we should ask ourselves. In many years of working with highly effective and efficient people, I have found one common factor among those who manage to get things done—they're always looking for the waste in their activities and testing ways to eliminate it.

The steps described in this chapter are simple, yet at the same time many people are challenged to do them without a coach to guide and even push them through this. PEP training has been popular because it provides facilitation. You can simulate this by teaming up with one or more staff, setting aside a day or half day to begin this process, and helping each other stay focused on getting through the steps. You can even have contests for "Most Organized," "Most Improved," and "Most Innovative." Then be sure to schedule a follow-up day because you almost certainly will have more to do in order to extend the process to older files or deeper levels of planning. Remember *Kaizen* and *do it now!*

