Planning and Organizing

Establishing courses of action for self and others to ensure that work is completed efficiently.

Key Actions

- **Prioritizes**—Identifies more critical and less critical activities and assignments; adjusts priorities when appropriate.
- **Determines tasks and resources**—Determines project/assignment requirements by breaking them down into tasks and identifying types of equipment, materials, and people needed.
- **Schedules**— Allocates appropriate amounts of time for completing own and others’ work; avoids scheduling conflicts; develops timelines and milestones.
- **Leverages resources**—Takes advantage of available resources (individuals, processes, departments, and tools) to complete work efficiently; coordinates with internal and external partners.
- **Stays focused**—Uses time effectively and prevents irrelevant issues or distractions from interfering with work completion.

Quick Tips

- Keep a to-do list.
- Prioritize your assignments and commitments.
- Use calendars, planners, tickler files, and other organizing tools.
- Use computerized planning, scheduling, and project management systems.
- Use voice mail, e-mail, and fax to send information and avoid lengthy discussions.
- Make phone calls in batches.
- Establish and communicate time limits for meetings and discussions.
- Do your homework before meeting with or presenting to others.
- Schedule regular "interruption times" so others will know good times to meet with you.
Developmental Activities

Self-Directed

- Break down assignments into component tasks. Estimate completion time for each task.
- Develop timelines and milestones to ensure progress toward project goals.
- Identify and allocate resources needed to complete tasks.
- Develop a resource usage chart to track tasks assigned to a resource (person or equipment).
- Identify the potential risks to your project plan and develop contingency plans to overcome them should they arise.
- Schedule regular updates during the course of a project to review progress on assigned tasks and to ensure that objectives are being met.
- Schedule follow-up meetings at the completion of projects to determine whether acceptable quality standards and time commitments were met.
- Analyze how you spend your time. Use a log to track what you do and how long it takes. Identify areas of waste and inefficiency, then work to eliminate them.
- Look for patterns in your workday (e.g., when specific tasks are done, breaks, lunch, etc.) and compare the timing with your "energy curve" for the day.
- Organize your work environment so you can stay focused on important assignments.
- Don't break off in the middle of one task to handle another.
- Look for planning tools that will help you get more organized.

Partnerships

- Involve team members/internal partners early and often in the project planning process.
- With the help of a manager, analyze an assignment that you handled very effectively or ineffectively. Request coaching to pinpoint behaviors that should be used or modified in the future; set appropriate controls/follow-up systems that will eliminate ineffective procedures.
- As a basis for setting priorities, review vision, values, and missions statements and organizational, departmental, and individual objectives. Discuss them with your manager.
- Meet with someone who has successfully created and implemented significant project plans to understand what was done.
• Volunteer to work on a project with another person who is a good planner and organizer. Ask the person for feedback on your methods.

• Ask a coworker who is an effective project manager to observe and analyze your project management skills.

• Observe coworkers who are skilled planners and organizers. Ask them for pointers.

• After a project is complete ask others for feedback on your planning and organizing skills.

• Develop a project plan then test your plan with individuals who have been successful in implementing similar projects.

**Targeted Assignments**

• Learn how to use personal planning software for managing your time, planning projects, and tracking progress toward milestones and goals.

• Volunteer for small projects where you can practice preparing realistic time frames.

• Ask your manager for a project management role in an upcoming strategic planning process.

• Volunteer to participate in planning a community event or fund-raiser.

**Workshops**

Look for a workshop that addresses the following:

• Determining how you allocate your time.

• Targeting top priorities.

• Dividing large projects into manageable tasks and activities.

• Coordinating people, equipment, and materials.

• Identifying barriers to effective job management.

• Developing the right strategies for meeting your objectives.

• Identifying a planning need, developing an information base, allocating resources, establishing a schedule for action, and establishing contingencies.

• Creating and implementing effective project plans.

• Methods of tracking and monitoring progress.
Readings

Books


In this practical book, the author reveals the “five stages of mastering workflow” and “five phases of project planning.” He explains how to collect all must-do items, place them in an in-basket, and then prioritize and organize them. The book includes a simple flowchart that ties together all his advice.


This book offers detailed, practical advice on project planning, organizing, control, project leadership, project coordination, delegation, and corrective actions.


This short guide provides the tools for managing projects from start to finish. It discusses the planning stages—including assembling the best team and identifying resources—as well as the use of project management software for scheduling work and tracking progress. The author also discusses how to juggle work for several projects at one time.


This book serves as an introduction to project management for those new to the process and concepts. It includes worksheets and checklists.


Kotter describes how effective managers really work and how strict, traditional time management practices may actually reduce efficiency.


This book advises readers how to complete projects on time and within budget. The author dispenses useful tips about time management, monitoring progress, using computer software, and shifting priorities as needed.


This ready-reference guide provides specific tips and tools readers can use every day to enhance performance and increase effectiveness. The book covers 18 topics to help get work done better and faster. These include getting organized, handling interruptions, gaining support from others, avoiding procrastination, and more.

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A tool kit for project management, this guide provides quick information on setting up and managing a project as well as checklists, guidelines, and other tools needed to implement plans.

Articles


After studying the behavior of busy managers, the authors maintain that these managers are not accomplishing as much as it might seem. The authors found that the most effective managers do not squander their time on unproductive tasks; instead, they focus on activities that can make a real difference to the company. This article discusses different types of manager behaviors and offers some solutions.


This article is a compilation of interviews with several effective executives who explain how they use technology to handle their busy work lives. The article includes a section titled “Six Quick Tips on Managing Your Time.”


This three-step plan for allocating time ensures that attention will be given to the right goals, thereby reducing unproductive time and making the most of work hours.


This article dispenses advice about managing the people, time, and resources necessary for successful project completion. It discusses various tools—such as Gantt chart, network diagram, and earned-value chart—that are valuable for concise planning and organizing.


The author lists and expounds on the responsibilities of an effective project manager. This is a good article for readers who want specific information on what steps are involved in planning, organizing, measuring, and adjusting activities for successful projects.