



Getting More From Their Time:

Time & People Management Strategies for Your Staff, Vendors, & Volunteers

Presented by
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A Leading Time Management/Smart Phone/Tablet/
E-mail & Info Overload Training Firm
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Agenda of Program

- Introduction
- Getting YOUR Act Together First
- Identifying Staff/Team/Vendor/Volunteer Resources
- Managing/Leading vs. “Doing”
- The “Project Manager” Mindset
- Delegation Mapping & Tracking
- Vendor & Volunteer Management

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Let's Get YOUR Act Together First!

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A Little Exercise

- Write out key projects and goals
 - Work and Personal
 - Also list “your people”
 - Refer to this list every week; incorporate into task list & calendar
- Also, write out “bucket list”
 - List anything you’d like – possible, not sure, etc.

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The Priorities Memo

- A listing of your most important personal and professional projects and responsibilities
 - Preferably in rank order
 - Preferably shorter rather than longer
- Why write them down?
 - To maintain your personal focus/discipline
 - To assist you in know when to say “Yes” and “No”
- *Can build directly from the responsibilities list generated earlier*

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A New Daily Start-Up Routine: Your First 5 Minutes



- Calendar FIRST!! (NOT E-mail!!)
- Check ahead 1-2 weeks – look for actions and “train wreck” days
- Then, look at today's calendar – how much time?
- Then, adjust task list per time available
- Begin to plan delegations & follow ups
- Next, check e-mail and other information inputs

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Let's Talk E-mail! (and your other inputs)

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THE Definitive CLUTTER Buster! *The 3-Minute, One Touch Rule*

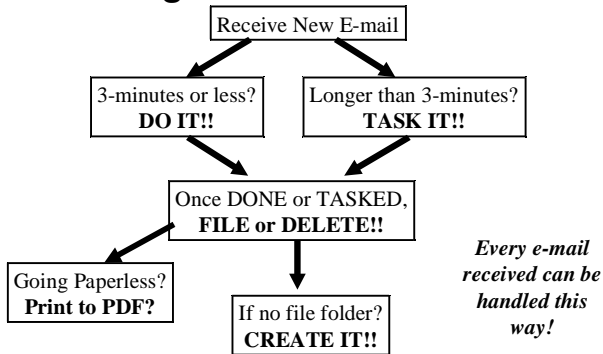
Every piece of information (*paper, fax, e-mail, v-mail, etc.*) that you get you should touch one time.

If you can take care of this task (accomplish, reply, file, read, forward, delete, toss, etc.) *in three minutes or less, DO IT RIGHT NOW!!!*

If not, file appropriately into the Priority box or task list (**Drag & Drop!**) to be accomplished in order of priority or urgency (you decide).

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"Taming E-mail" Decision Tree



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Back to Your Daily Start-Up Routine



- Calendar FIRST!! (NOT E-mail!!)
- Check ahead 1-2 weeks – look for actions and “train wreck” days
- Then, look at today's calendar – how much time?
- Then, adjust task list per time available
- Plan delegations & follow ups
- Next, check e-mail and other information inputs
- Adjust task list one last time due to new inputs
- Complete your delegations & follow ups
- GET TO WORK!!!

Let's Talk About Your People

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Your People

- Your supervisors
- Your co-workers
- Your staff/team
- Your vendors
- Your volunteers

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Taking it to the Team: Current Projects, Roles, & Goals

- Define for Each Team Member
 - Key Projects
 - Key Roles
 - **Key Goals:** *What determines your team member's success?*
- **Exercise:** write out all work projects (including subprojects), roles, and goals for each team member (*idea: have them do it for you?*)
- **Finally,** rank order projects, roles, and goals

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Staff Management Memos

- Similar to your own “Priorities” memo
- Include any people that report directly and indirectly to you
- Use the memo to track their current projects/deliverables/due dates
- Also useful for continuing feedback
- Take advantage of opportunities to be a “One Minute Manager”
- *Is it a good idea to possibly have one of these for your supervisor also??*

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**“In doing your project,
don’t wait for others;
go after them and
make sure it gets done.”**

– William Swanson

Waiting On's . . .

- *Anything owed to you by anybody . . .*
- Money? Tax refund?
- Books/CD's loaned to friends/relatives
- Phone call's/faxes/e-mails with info you are waiting on.
- Develop your new personal brand – “the polite but persistent pest”
- A great urgency reduction tool

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Assigning/Delegating Tasks in Outlook

- Very handy tool for effectively delegating tasks and deliverables
- Creates new task that is carried in task list of task requestor and task owner/manager
- When task is assigned, creates e-mail that is received by task recipient.
 - Recipient has opportunity to accept or decline
 - Additional text/information can be shared in note field

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Effectively Managing Direct Reports

- “Project Folder” & Planner/Smart Phone/Evernote “Staff Priorities” memo for each employee
- Clear knowledge of project load and responsibilities
- Clear understanding of deliverables and timelines
- Frequent BRIEF meetings (daily/weekly)
- Avoid “Jumping and Dumping Monkeys”
- Protect against unnecessary interruptions (use Interpersonals Memo methodology)

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Effectively Managing Direct Reports

- Be protective of THEIR time – unnecessary meetings/ tasks/workload/interruptions
- Show respect and value for their time and effort
- Help them understand the true value and importance of their work
- Advocate for appropriate resources/training
 - Endorse/utilize appropriate technology (Planners/Smart Phones/Tablets/Software?)
- Teach them what you've learned today!

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Avoiding Micromanagement

- Fine line between “active” management and “micromanagement”
- Most people enjoy clarity of goals/focus
- But they don't like being told how to do things
- Some people require more follow up & follow through
- Some people “need to run”
- This is more art than science – the “collaborative” manager vs. the “autocrat”

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Time for a Strategic Look at Your Team

- Do you have the right pieces in place?
- Are you properly staffed for your mission/goals?
- Does each team member have the proper training/education/skill set to accomplish team goals?
- Do you have a delegation plan for each staff member?
- Do you have a development plan for each staff member?
- Do they have the tools they need to be successful?
- What projects and tasks should you personally be doing? Which ones should you be delegating?

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A Shorter Task List?

- Less doing, more coordinating
- Planning delegation & development
- Tracking performance
- Providing assistance & support
- Not “biting off too much”

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Vendor/IC Management

- Not on your staff, but can get much done
- Recommend tracking just like staff
- Have numerous clients/customers
- My experience: “the squeaky wheel”
- You do not have unlimited resources – can only use them so much, but ...
- 4 Hour Work Week model?

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Volunteer Management

- Also not on your staff, but also can get much done
- Remember they are volunteers!
 - They are doing this due to their connection with your organization (and maybe for some personal benefits)
 - Give them too much, likely to underperform
 - Also likely to burn out/move on
- Use & find their passions for best performance
- *Best Practice*: one project/task at a time

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Let's Talk Recognition

- Volunteers aren't paid, but ...
- You can give them public recognition
- Gifts, prizes, perks, awards?
- Free membership? Free conference registrations?
- Résumé fodder? (References, LinkedIn, etc.)
- A simple handwritten "Thank You"?
- Goal: "The Evangelist"
- Can you do this for your staff & vendors too???

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Vendors & Volunteers

- Both need effective tracking & management
- Also need continuing feedback
- Build relationships and you'll build performance
- May provide you with the additional productivity needed to accomplish broader firm goals
- Remember, "Less is More" – the less you do, the more you might be able to get them to do

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Beyond Staff: Other Resources

- What other resources do you have available?
 - Student workers
 - Independent contractors/contract workers
 - Vendors
 - Technology
 - Organization
 - Training & Development
 - BUDGET
- *What is in your extended toolkit?*

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Putting it All Together

- Big picture goals, projects, responsibilities
- Plans for each team member (vendors/volunteers)
- Coordination over doing (daily process)
- Time planning and blocking
- Using different meeting models
- Utilizing the Entire “Toolkit”
- ***Having “Infrastructure” to manage it all***

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Circling Back

- It isn't really time management per se, it is people/project/goal management
- Will likely require a change in behavior
- Will likely require a change in plan
- Are the goals too expansive? For you? For your team?
- Do you need greater clarity/focus?
- Is your team designed properly? What do they need?
- Do you feel empowered for this change?
- *Rome wasn't built in a day.*

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Final Thoughts:

- Lots of info to chew on here:
 - Pick the ideas/strategies that work best for you
- Spend time now getting your “forest” organized and clarified
 - Revise personal calendar
 - Revise personal project/task list
 - Build delegation & follow up plan
- Then, start meeting with individual staff/vendors/volunteers to share vision and plans for change/development

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“Be the change you wish to see in the world.”

– Gandhi

Where to Get More Info:

- David Allen's *Getting Things Done*
- Stephen Covey's *Seven Habits of Highly Effective People* and *First Things First*
- Malcolm Gladwell's *Blink*
- Ken Blanchard & Spencer Johnson's *The One Minute Manager*
- Tim Ferriss's *Four Hour Work Week*

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Where to Get More Info:

- Randy Dean's Amazon e-mail bestseller: *Taming the E-mail Beast: 45 Key Strategies for Better Managing Your E-mail Overload* (available in E-book format now!) – go to Amazon.com and search “Taming E-mail”
- Randy's first book: *Major Satisfactors = Major Success*

Other Randy Dean info:

- Facebook: <http://www.facebook.com/tamingemailbeast>
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- Randy's *Timely Tips* e-news:
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Other *Randall Dean* Programs:

- Keynote/Breakout Session: *"Finding An Extra Hour Every Day"*
- *Optimizing Your Outlook (1-hour to 1/2 day)*
- *Managing & Leading Great Staff & Team Meetings (1-2 Hours)*
- *Time Management in "The Cloud" Using Google Apps*
- *Smart Phone Success & Terrific Tablets: Getting More Productivity (and Fun!) From Your Devices*

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We're Done!!!



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