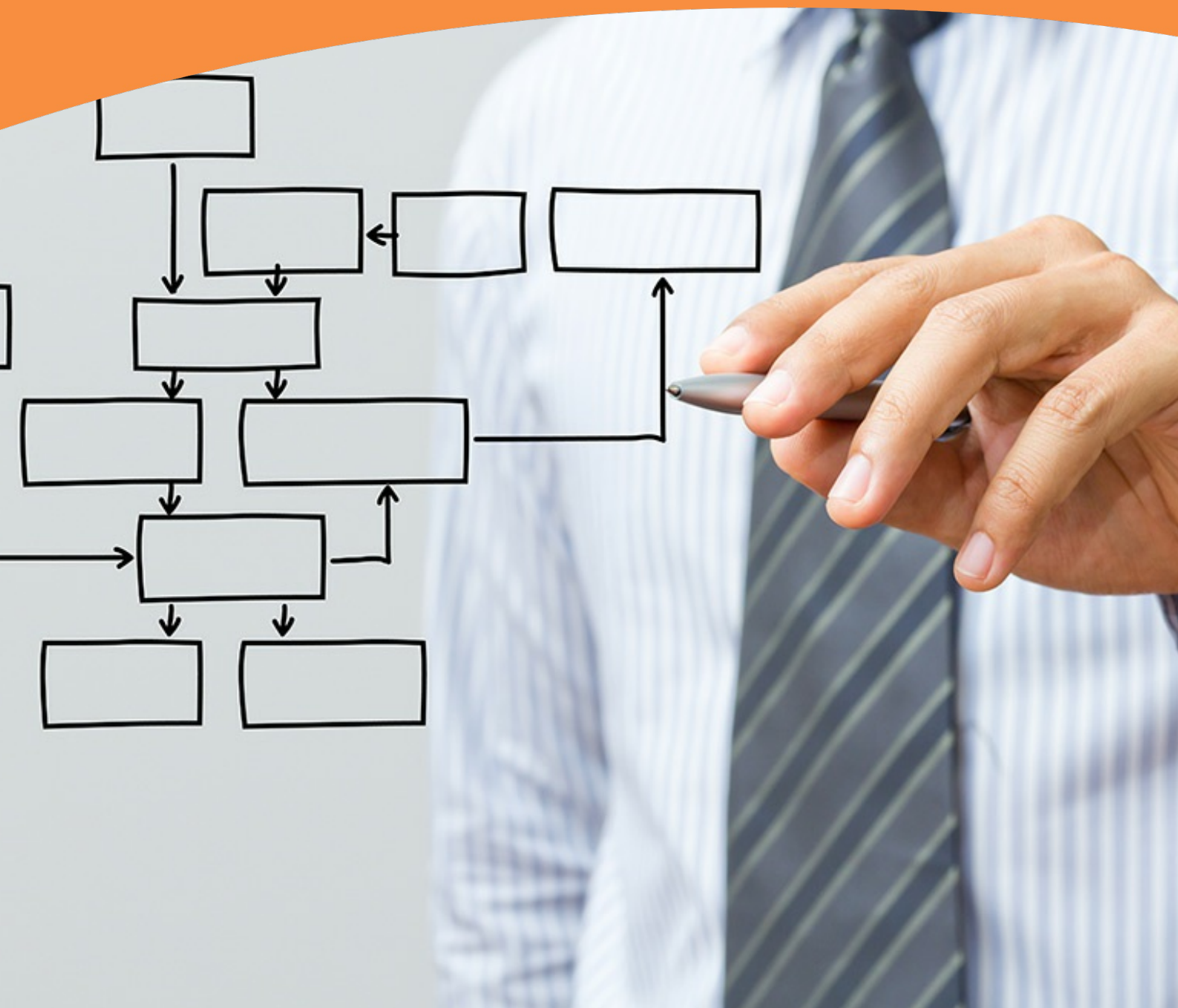


# Project management for entrepreneurs

Harold L. Taylor



Harold Taylor

# Project management for entrepreneurs



Project management for entrepreneurs

1<sup>st</sup> edition

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# Introduction

For most of my life I have been avoiding project management books like the plague. I was so turned off by the jargon and seeming complexity of the process that I couldn't see the relevance of project management for an entrepreneur such as myself working on small projects. What in the world is *project diagnostic metrics* for instance? And who ever heard of *integrated change control*, *project infrastructure planning* or *earned value management*? I couldn't seem to get past the *plan variance analysis* or *project baseline setting*. *Deliverables*, *resource setting* and *activity definition* all seemed like a foreign language to me.

But I also knew I needed a more formalized planning process when I tackled tasks such as publishing a book, developing a product or designing and delivering a workshop. A simple brainstorming process where I would jot down all the things I needed to do, and then do them simply wasn't cutting it. I would forget something, misjudge the total cost, start a certain task too late or underestimate how long the total project would take.

So I developed a simplified project management process for entrepreneurs that worked well for all the projects that I tackled during the years. In fact I used the process to develop a project management kit, which I call the *Taylor Project Manager*. Who needs more jargon, fancy words and complexity in their life?

The most important benefit for me is that it forces me to spend adequate time planning a project before rushing ahead with it. After considering the cost, time and effort required, I decided not to proceed with many of my hair-brained schemes. Other projects have been less expensive, less time-consuming and more profitable because of it. And when you're called a "professional organizer" or "professional speaker" or a "time management expert," your reputation and ultimately your success depends upon consistently completing client projects on time and consistent with their expectations.

In this brief book on *Project management for entrepreneurs* I describe a simple project management system that works well for small organizations. I have also included a few of the relevant topics that are included in other books on project management, such as leadership, communication and delegation. But I have limited discussion to information that is applicable to a small, one-person organization or one with only a few employees.

Entrepreneurs are generally busy people who read for results, and want to get to the bottom line quickly. Forget the frills. So I have kept the secondary, yet relevant information in separate chapters near the back of the book. Most of the essential information on project management is up front, in the first few chapters. So if you only have time to read half the book, at least you will get seventy percent of the most relevant information.

# 1 Know where you are going before you start

## 1.1 Everyone needs a roadmap

Roadmaps are great. Motorists used to have one or more stashed in their glove compartment or in pocket on the inside of the car door. Now most of us have traded them in for a GPS. Trouble is, the only time many people look at these maps is when they are lost. By then they are blocks or even miles off course. They have to risk pulling off the side of the road in the rain, turn on the inside light, and peer at the small print, trying to pinpoint where they are in relationship to where they want to go, and decipher the streets they will have to take in order to get there. Two or three u-turns, dead-ends and one-way streets and they arrive at their destination just as the party is winding down. They are tired, frustrated, angry and embarrassed. Their hosts and friends are disappointed. Money and time has been wasted. The fact that they make the trip back home in record time after a few minutes of instruction by their hosts is little consolation for a ruined evening, frayed nerves and a lingering resentment of a spouse's late-evening comment, "I thought you knew how to get there!"

Well, maybe you did know how to get there. But frequently, when traveling, the shortest distance between two points is *not* a straight line. And you should know the best way to get from point A to point B *before* you start your journey.

Similar situations continually arise in business. People start projects without looking at a map first. And as a result they waste time and money, experience frustration, disappointed clients, tarnished reputations and lost business. Sometimes they might even deliver poor quality, incomplete projects and costs exceeding their original estimate.

Project management will prevent this from happening. It is a roadmap that tells you in advance which streets you have to take, and in what order, the directions you have to travel, the distances you have to go, and the total time the journey will take.

There are some things a map *won't* tell you. If you knew there was a service station on the corner where you turn, a stop sign one block before the house you were looking for, and a huge oak tree in their front lawn, it would be even easier to get there. But where would you get this type of information? From others who have been there. That's the power of networking as discussed in chapter 7.

## 1.2 What is project management?

A *project* is a series of interrelated tasks that accomplish a desired objective. The *Project Management Institute* defines it as “a temporary endeavor undertaken to achieve a unique product, service or result.” A project is not part of your daily routine. It is something that has to be accomplished in order to create, fix, improve or sell something. It could be to design and deliver a workshop, to write a book, organize a garage or any number of things. It could take less than a day or more than a year to complete. It can be as complicated as building a skyscraper or as simple as preparing a dinner. But the process used is essentially the same.

Projects must have a clear objective, a time frame, a budget, and a plan of action. The plan includes a list of what needs to be done, who will do them, how long it will take, and the start and completion dates of each task.

*Project management* is the *management* of the *project* described above. The function of *management*, according to my old college-teaching days, consists of planning, organizing, staffing, directing and controlling the resources connected with the project. Some texts include innovating and representing and others add decision-making (although decision-making takes place in all those functions.) Definitions such as this tend to complicate things. I prefer Sid Kemp’s definition in his book, *Project Management Made Easy*, when he says there are three things to do in order to manage a project – *plan, do, and follow through*.

For the purposes of this book, I view *project management* as part of the planning process. Planning encompasses everything that has to be done before the actual *doing* stage. This includes vision, mission, goals and scheduling. Project management fits in between goal-setting and scheduling – although I am including scheduling as a part of the project management process since it is so closely connected.

The person who directs all of the above is the project manager. As the project manager, you must review and initiate the plan, see that it remains on target, solve problems and make adjustments when necessary, and evaluate the final results.

### 1.3 The need for planning

Most problems occur due to a *lack* of planning. Critical steps are overlooked, costs get out of hand, potential problems are not identified or poor communication exists among the various people involved. This is true for experienced project managers as well. Sid Kemp, in his book, *Project Management Demystified* (McGraw-Hill, 2004,) claims that in information technology about half the projects fail and over 80% are over budget. To quote Curtis R. Cook, author of *Just Enough Project Management* (McGraw-Hill, 2005,) “*We don’t have enough time to plan, but we do have enough time to react to the negative consequences that will undoubtedly hit us if we don’t do a good job of planning the project up front.*” Cook claims that at least 5% of the total project time should be spent planning. If you have a project that you estimate will take 60 hours, for instance, you should spend at least 3 hours planning.

If anything, this figure is low – especially for shorter projects and more creative endeavors. Studies show that professional writers, for example, spend 40% of their time planning and only 25% of their time writing. The remaining 35% is spent editing. So if your project is to write a book, for instance, you will be spending a lot more time planning than you might spend on other projects.

Many small business owners tend to rush into a project with a lot of enthusiasm but little planning. It takes more than an idea, an objective, and desire in order to succeed. We may succeed eventually, but with an inordinately high expenditure of time, energy and money.

Have you ever raced against time to get a mailing out to your prospects before the holidays only to discover you had forgotten to order the envelopes? Or you discovered that the printer was closing for two weeks? Or an important insert had been overlooked? Even small projects need to be planned. A good project management system will insure that adequate planning takes place.

Most of us are doers. Especially if we’re entrepreneurs. We are anxious to get on with the project and see it completed. Many of us are too impatient to do a lot of planning. Unfortunately it’s common to underestimate the time required for projects. As a result, we sometimes make promises we can’t deliver. And in the case of an assigned project, it’s always easier to negotiate a completion date *before* the project starts than it is in the middle or near the end of the project. Following the project management process forces us to slow down and consider all aspects of the project, including realistic time frames and costs. It also helps us stay on target. A project doesn’t suddenly get behind by two weeks. It slips behind an hour or two at a time. Flow charts, which we’ll be discussing, help prevent this slippage.

There are other people, on the other hand, who use planning as an excuse to procrastinate. They have trouble *starting* the project. Here again, the structure of the project management process helps keep them moving. You don’t want to procrastinate; but you don’t want to jump into anything without first thinking it through either.

## 2 Anatomy of a project

### 2.1 The three stages of every project

There are three stages to every project we undertake, whether small or large; the idea and planning stage, the building or doing stage, and the final stage where the product or service is actually put to use. It's a lot less costly to catch a mistake in the planning stage than in the final product. The 1:10:100 rule usually applies. It costs ten times as much to solve the problem in the building stage and one hundred times as much to correct it once the product is completed.

Unfortunately I have plenty of proof that this ratio holds true. In the early days of my business, in the *fly by the seat of my pants* days, we made some major changes to a planner that we sell. It involved adding quite a few more pages, but I never thought ahead to see what impact this would have on the separate vinyl cover that was being manufactured at the same time. Because of the new planner thickness, the covers would no longer fit, causing a \$2000 loss in scrapped covers. Catching this error in the building stage would have cost about \$200 for a die change. But if I had caught the error during the planning stage, which was sadly lacking, it would have only cost the time it took to check the specifications, probably about \$20 at the time. There's your 1:10:100 relationship.

It took more than that one experience to convince me that every project, no matter how small, and seemingly simple, requires project management. The process described here forces me to slow down and consider all aspects of the project before I make the first move. That 5% planning time has saved more than just money. It has eliminated a lot of worry, frustration, sometimes even panic. It has prevented me from making costly errors and ruining my credibility. And it has given me confidence that others can carry on my work effectively when I'm no longer around to oversee everything.

### 2.1 Why use project management?

Using a project management approach to getting the important things done will increase your chances of success. In fact, Ken Ziegler, author of *Getting Organized at Work*, claims that there is a direct correlation between the amount you write about your project and the probability of succeeding at it. Writing things down not only clarifies your thinking and makes the project more real, it increases your commitment to the project.

By using project management, you will be able to identify potential problem areas easily. It will also provide a realistic estimate of what the project will cost you, how long it will take, and whether the return on your invested time and money is worth it or not. In general people spend too much time doing things and not enough time planning. Planning makes the doing easier.

You have probably heard the comment that planning takes the future and brings it into the present where we can do something about it. That's how I see project management. It is a snapshot of the entire chain of events from the present to the future that reveals everything that has to be done in order to successfully complete a project. If I can actually see that a delay will occur in some future activity, I can make changes now so that the delay doesn't occur.

You could use the analogy of driving to work through traffic. You don't know what the hold-up is ahead; you only know that you have come to a standstill. But if I were to lift you up in a helicopter so you could see for miles ahead, you would know that there's a major accident six blocks down the road, and that you could easily avoid it by making a right turn at the next light and traveling along a parallel street. Seeing what lies ahead in the future allows you to make adjustments in the present.

The number one reason people put off projects (that could increase revenue and expand their business) is that the projects seem too difficult, too complicated or would consume too much time and effort. Project management simplifies the process by breaking the large projects into small, manageable chunks.

As mentioned earlier, the biggest advantage of using project management in your business is that it forces you to spend adequate time planning. Most self-employed individuals are action-oriented. They are doers, not planners. There is an old Japanese proverb that says *a plan without action is a daydream, but action without planning is a nightmare*. Project management will take away your nightmares.

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Probably the most common use of project management for entrepreneurs is to achieve the goals that you set for yourself and your business each year, whether that be to develop a website, design and deliver a workshop, write and self-publish a book, promote a service or whatever. But it can also be used during day-to-day operations to *develop* procedures or in client assessments when you want to determine how you would proceed with a job, how long it would take and how much it would cost. This would ensure that you didn't forget anything when you quoted on a job. Organizing the various tasks into a project may seem time consuming initially. But in the long run, it will save time, effort and improve results.

## 2.2 When is a task a project?

Your project may be large, such as starting a professional organizing business, smaller, such as sponsoring a seminar, or even smaller, such as placing an ad in a local newspaper. The process is essentially the same, except that with really small projects, such as making a phone call, you may be doing it all in your head or with a pen and notepaper only.

A project has clear start and end points and requires a sequence of individual tasks to be performed in order to reach that end point. Routine work performed repetitively on a regular basis is process-oriented and normally not considered to be projects. For example, invoicing a client has a start and end point and a sequence of steps in between, but you are doing it repetitively in a routine manner, so it wouldn't normally be referred to as a project. The start and end points become blurred when you are doing something again and again. It becomes a procedure or ongoing process – even though the first time you did it, you may have treated it as a project.

Even a small job like placing an ad has several steps to it. You may have to obtain a media kit, determine the size of the display ad you will need, find out the cost, determine when you have to submit the material, create the actual ad, and submit it. You may need to find someone to do the art work, determine whether to buy premium placement, and arrange payment. You will want to proof the ad before it is inserted, determine how you will measure results, or even calculate a break-even point. The simple placement of an ad actually contains a lot of steps, and some of them will have to be done in a specific order and within a specific time frame in order to meet the magazine's deadline. When you go through the project management process in advance, you will probably discover other things to consider as well.

In the case of placing an ad, however, you might get away with simply listing the things you have to do on note paper and deciding who will perform the various tasks and when they should be done – once you have determined the cost, that is. And if you do it again and again, it becomes a routine procedure to be followed. But the more steps that are required in a project, the more complicated it becomes. Then you will want to use some structured process so you can keep track of everything. If you launch any kind of a project without adequately thinking through the process, you could waste time, money *and* opportunity.

### 2.3 Projects within projects

In most business situations there are projects within projects. For example, if your project is to start a speaking business, you might want to write a book for credibility, develop a press kit, sponsor workshops for visibility, and conduct a media campaign to gain recognition and so on. Each of these smaller projects may consist of some even smaller projects as well. You would follow the same procedure for each project. For the “*Develop a Speaking Business*” project, only the main activities would appear on the *Task List*.

Start with the large overall project to determine the tasks that have to be performed, and then work through the steps of each sub-project, using similar forms. With some of these smaller projects you might get away with just a checklist. But you would still have to add up all the times for the individual projects in order to determine your time commitment for the overall project. You may very well discover that you will need to devote three or more years to successfully launch your speaking business.

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Step 2: Break the project into tasks.

Mentally walk through the entire project as shown in Exhibit 2, jotting down all the tasks that have to be done in order to complete your project. At this stage don't worry about the exact order in which you have to do them, the cost, the time or anything else. Simply brainstorm, jotting the individual tasks on the *Project Manager Task List* as you think of them as shown in Exhibit 2. After you have all the tasks listed, record the approximate order in which you would have to do the various tasks. Put these numbers in the "Sequence" column at the left side of the form. Don't worry about accuracy at this stage or whether several tasks would be done simultaneously by different people. You simply want an approximate sequence to make step three easier.

**TAYLOR** Project Manager - Task List  
 Project: Time Management Workshop Objective To net \$5,000 minimum by conducting a full-day time management workshop in Septemebr of 2009.

Sequence	Task
1	select date time and place
2	book facility
3	write seminar outline and description
4	advertise on website
5	place write-up in electronic newsletter
6	send email to past participants
7	mailing to current customers
8	write course notes
15	prepare map and directions
9	make sign for seminar door
10	prepare PowerPoint slides
16	write acknowledgement email to registrants
11	make up certificates
21	order continental breakfast and lunch

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**Exhibit 2**

Step 3: Create a flow chart

A flow chart is a diagram made up of cards or sticky notes that tell you the order in which tasks must be done. Using *Flow Chart Cards*, or *Flow Chart Sticky Notes*, Exhibit 3, write the task titles on the cards and determine the exact sequence by juggling the cards. If you are the only one working on the project they would all be in one straight line. But if others, including suppliers, are involved, the cards or sticky notes would be in two or more rows, indicating that certain tasks are being worked on simultaneously. When you feel you have them in the right order, fill in the details, leaving the sequence number until last. It may change after you approximate the time required, the cost, and the person who will perform the task.

**TAYLOR Project Manager**

**Task:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Who will do it?:** \_\_\_\_\_

\_\_\_\_\_

**Time req'd:** \_\_\_\_\_

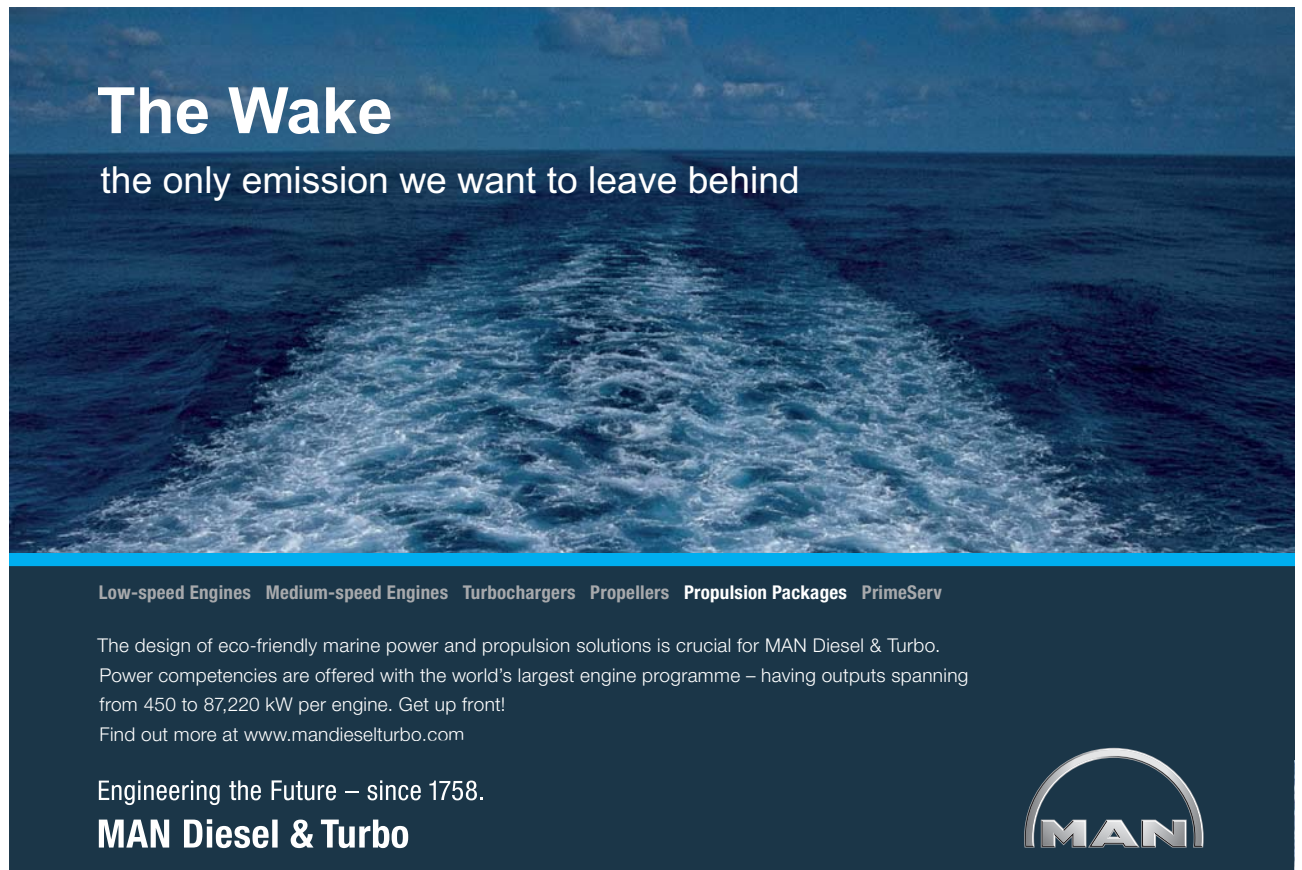
**Cost:** \_\_\_\_\_

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**Exhibit 3**

*Step 4: Prepare a project work plan*

When you have completed the flow chart and determined the exact sequence, copy all the information onto the form shown in Exhibit 4, the *Project Manager Work Plan*, adding the start date and target date for each task. This is the master project plan that you and others will follow.



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### 3.2 The project management process

Here are more detailed descriptions of the five steps and instructions on how to use the forms mentioned. You may want to develop your own procedure or vary the use of the forms.

#### *TAYLOR* Project Manager - Notes

*Break even calculation.  $FC + VC = TR$*

*$850 + \$20x = \$350x$*

*$350x - 20x = 850$*

*$330x = 850$*

*$x = 2.6$  (3 people)*

*3 people to break even @ \$350/person registration fee.*

*with 20 people,  $17 \times \$330 = \$5,610$  profit.*

*9am - 4pm*

*1 hr. lunch, 2 breaks*

*Wilson's boardroom - Sept 15*

*overflow on 16th?*

#### **Exhibit 5**

Let's assume for this example that you are thinking about sponsoring a workshop for clients and prospects.

#### Step 1. Define the project

This includes the idea stage. I recommend that you use note paper initially and think with your pen in hand. What is it you want to do or manufacture or provide? If it's a workshop, what's the topic? Why would people be interested in attending? What registration fee do you have in mind?

Where would you hold it? How many people would have to attend in order to make a good profit? What topics would you include? How would you advertise it and promote it? What materials would you include in the registration fee? What are the major costs involved? How risky is it? This preliminary thinking will determine whether you should even consider the project. If you think it would be more trouble than it is worth, scrap the project before you start. Exhibit 5 shows the use of note paper for this initial planning stage.

Assuming it makes sense to sponsor a workshop for your clients and prospects, continue with the planning. Perhaps it will provide a useful service to your clients as well as make a good profit for yourself. You may think you will enjoy the experience and gain knowledge in the process. It may be worth the time and effort. You can always change your mind at any point before step five if the project management process uncovers hidden costs and problem areas that you hadn't considered.

This preliminary idea stage primes the pump and gets you thinking about the project before you even use the first form, the *Project Manager Task List*. In the above example, your working title might be *Time Management Workshop*. Your objective might be to net \$2000 by offering a full-day time management workshop on such and such a date. You no doubt will already have made a lot of decisions during the preliminary idea stage. After a break-even analysis, you may have decided to set the fee at approximately \$200, use your friend's boardroom, limit the session to 20 people, and provide a working lunch and so on. You may end up changing your mind on some of these details as you go along and that's okay.

The advertisement features a central graphic of three stylized human figures surrounded by gears, all enclosed within a circular arrow indicating a cycle. To the right, the text 'UNLEASHING CHANGE MANAGEMENT' is written in large, bold, blue letters. Below this, the dates 'OCTOBER 18 & 19, 2018' and the location 'DE RODE HOED AMSTERDAM' are listed. The bottom of the ad shows a silhouette of an Amsterdam skyline with a windmill and a bridge. In the bottom left corner, the text 'Global Executive Events' is visible.

Step 2. *Break the project into tasks.*

Using the *Project Manager Task List*, quickly write down everything you have to do from start to finish, putting them roughly in the order you would perform the tasks. At this stage don't worry if you get them mixed up. You will not record the sequence in the left column until you have recorded all the tasks.

You would probably start with "Select date, time and place." The rest of the list might begin as follows:

- Reserve boardroom for workshop date
- Write seminar outline and description
- Compile email lists for promotion
- Post on relevant websites and forums
- Write advertisement for ezines
- Send email to current clients
- Write student notes
- Make up certificates of attendance
- Write registration acknowledgment email
- Prepare map for directions
- Make sign for seminar door
- Make up lapel badges
- Order sandwiches and muffins
- Prepare PowerPoint slides
- Prepare seminar checklist
- Print student notes
- Set up room
- and so on.

The tasks will probably not fall in that order on the final *Project Manager Work Plan* but they are roughly in the order you will perform them. Some things such as printing will be done by someone else. As you read over your list, you may think of other things that you have forgotten, such as make up evaluation sheets, prepare student exercises, buy a flip chart etc. You might want to leave the form for a few days and then come back to it. A fresh look will probably help you spot a few other tasks that are missing. Have an associate read your list and see if they can spot anything that you missed.

A visualization technique is a good way to make sure you have thought of everything. When I plan a seminar, I visualize myself as a registrant leaving home to attend the seminar. Do I know where it is? Do I have directions? Is there parking available? Where? What room am I going to? Is there a sign on the door? Is there somewhere to hang my coat? Is there a tent card or place card identifying my seat? Do I have a name tag to wear? Are there writing materials at the table? And so on. It's surprising how many details you may have overlooked. And each item requires a task, such as make up map, send out instructions, print name tags, buy pens etc. Once you feel you have listed everything that has to be done, go to step three.

Step 3. Develop a flow chart

From the *Project Manager Task List*, copy each task onto a *Flow Chart Card*, or *Flow Chart Sticky Note*. Place the cards in the order you have indicated for the tasks, but don't record the sequence number or any other information on the *Flow Chart Cards* at this point. When you have them all in place, juggle them around to create the most efficient work flow. Take note of the critical path. The critical path is the path that will take the longest time. Any delay in activities along this critical path will delay the entire project. If a task, such as printing notes, takes several days you will want to start that task early in the process and work on other things while the printing is being done. At that time, some flow chart cards will be below the others, indicating the jobs are progressing at the same time. If you have others helping with the project you may have several rows of cards, some below the others at certain points on your flow chart. When you have all the cards in order, record the balance of the information on the *Flow Chart Cards*. Who will do each task? What cost, if any is involved? How much time will the task take? A few cards in the flow chart series are illustrated in Exhibit 6.

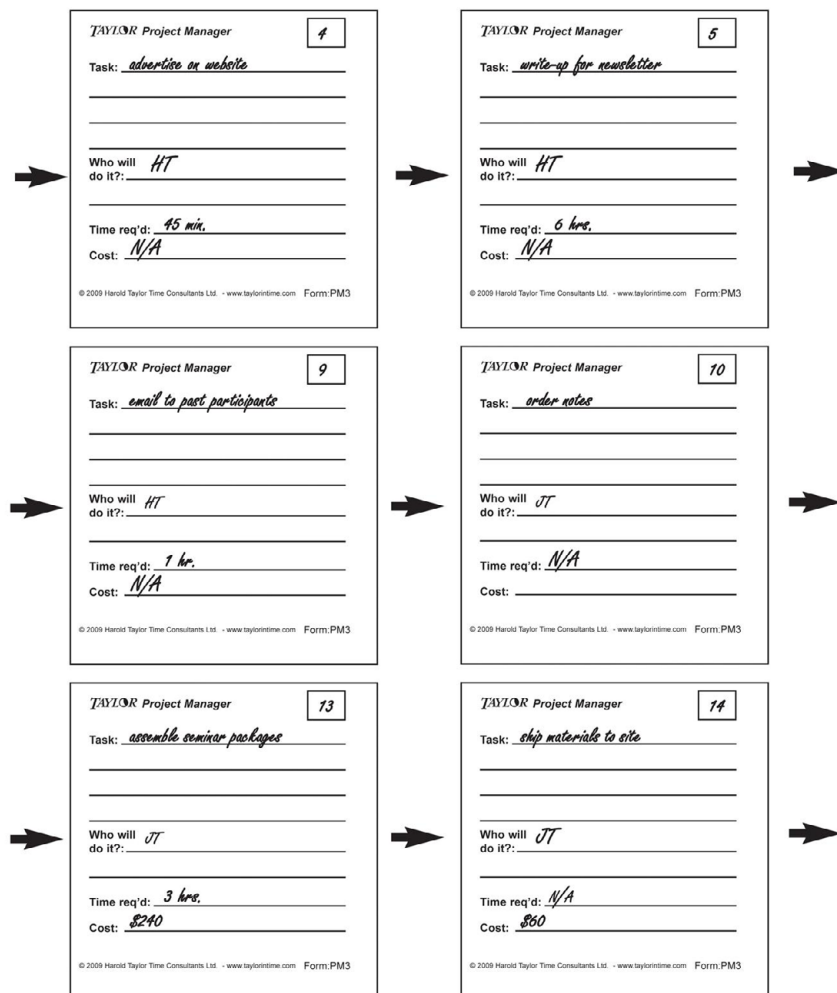


Exhibit 6

Forms printed on sticky notes have an advantage over the cards, inasmuch as they stay in place while you juggle them around and write on them. You can stick them on a wall where they are out of the way, and where everyone can see them. On the other hand, you may prefer the cards, which can be shuffled around easily and quickly.

As you review your flow chart make sure you have allowed enough time for each task. If I'm doing a task personally, I allow 50% more time than I think the task will take. Some people add as little as 10%. Use what works for you. Depending on your experience with your suppliers, add float time to the times they quote you as well. Make sure the sequence makes sense. For example, you have to do the research before you write the student notes. You have to write the notes before you get them printed. Publicity and promotion are critical to the success of the workshop so make sure you have allowed enough time. The sooner you can get started, the better. This tells you that the course description should be one of the first things you do, long before you write the detailed notes, prepare PowerPoint slides or buy certificates and tent cards.

#### Step 4. *Prepare a Project Work Plan*

The flow chart that you have prepared will illustrate your plan of action, but the dozens of cards or the sticky notes arranged on a table or wall are neither portable nor permanent. And at this stage you don't know when each of the tasks is to be started. Copy the information onto the *Project Manager Work Plan*, as shown in Exhibit 7, and add the actual start and completion dates for each task as well as the target date for the entire project, the total budget, and the names or initials of the people involved. This becomes your master plan. Give copies to each person responsible for completing the various tasks. By having a copy of the work plan they will be reminded of their deadlines and they can see at a glance how other tasks are dependent upon them finishing their tasks on time.

If you will be the only one working on the project, carry a copy of this work plan with you, ideally in your planner, and schedule time to work on the tasks as indicated in the final step of the process.

**TAYLOR** Project Manager - Work Plan

Project Time Management Workshop Objective To net \$5,000 minimum by conducting a full-day time management workshop in Septemebr of 2009.

Target Date Sept. 15, 2009 Budget \$1,500 Participants Harold Taylor, PrintOne, Jason Taylor, Winston Bromley

Seq.	Task	Assigned to	Time req'd	Cost	Start date	Target date
1	select date, time and place					
2	book facility					
3	write seminar description					
4	advertise on website					
5	write-up in newsletter					
6	email to past participants					
7	mailing to customer base					
8	write cover notes					
9	acknowledgement email					
10	prepare map and directions					
11	prepare powerpoint slides					
12	print course notes					
13	prepare seminar packages					

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Exhibit 7

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### *The use of checklists*

As mentioned earlier, you may find that you have smaller projects within the project. For example, if you are planning to sponsor a workshop you may have a task that reads “Prepare handouts” or “Set up room”. If so, I suggest that you put a star or large ‘X’ in front of these items and prepare lists of things that have to be done. For example, on a list headed “Prepare handouts” you could list the various items you will be giving to the students, such as note pads, pens, workshop notes, certificates, evaluation sheets, reference books, promotional flyers for your next workshop, business cards, discount coupons and so on. You may be surprised at what you would have overlooked otherwise. Check your inventory of these various items as you list them. You may have to adjust the time allowed for the “Prepare handouts” task if any of the items have to be assembled or printed.

Similarly, when you brainstorm what needs to be done when you set up the room, you will end up with a checklist of items such as projector, laptop, extension cord, flip chart, coffee station, place cards, etc. Here again, you may discover something that will increase the time allowed for that task. You may also decide to break out one of the items and add it to your *Project Work Plan* form as a separate task.

You could add all the items on your checklists to your *Project Work Plan* but why clutter it up with such trivial items as “bring timer”, “close blinds”, etc. I have made up what I call a *Seminar Checklist*, listing all the items that I need to bring to the seminar room, including food items, handout materials, visual aids etc.

Your work plan and checklists, with minor adjustments, can be used for every workshop you sponsor. That’s one of the advantages of using the project management system for repetitive events; you can use the same plan again and again, changing the dates and making any necessary revisions as you discover better ways of doing things. The time you spend planning is minimal when you use the plan over and over again. My master plans for public workshops, distance education programs, in-house training and keynote speeches have been used numerous times.

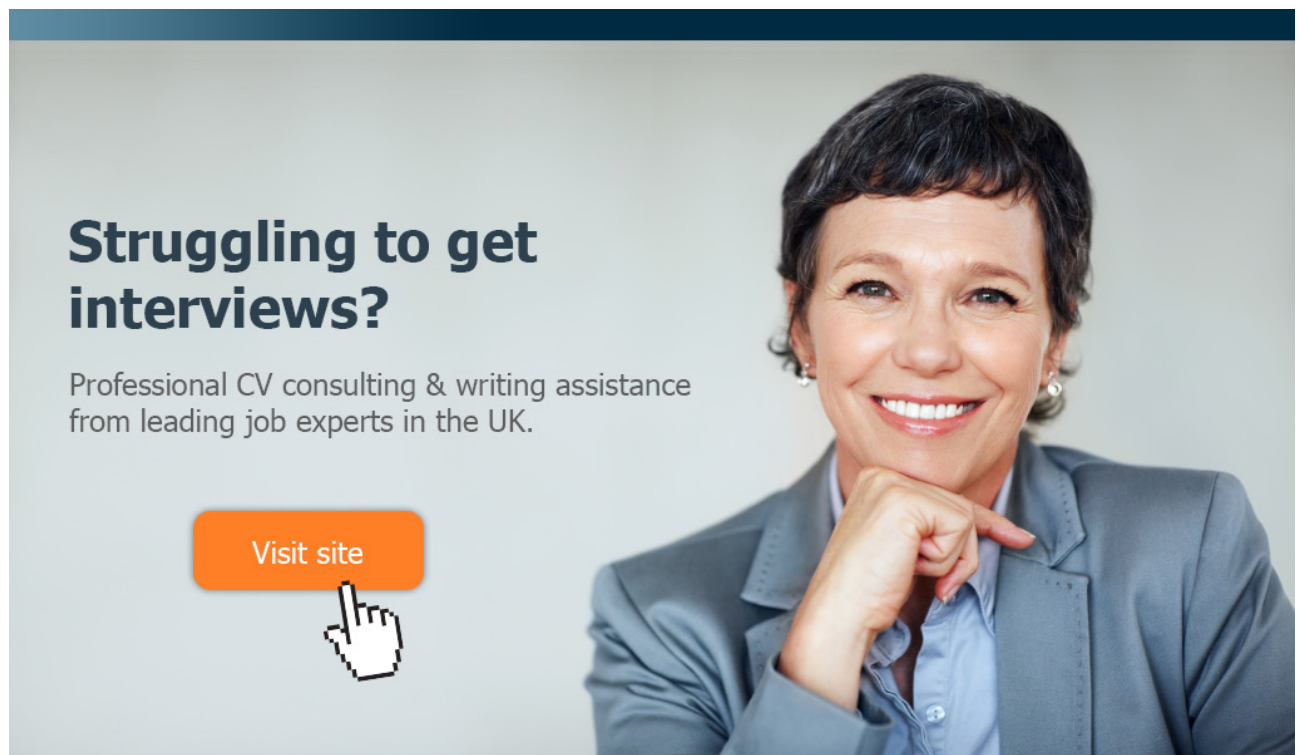
### *Step 5. Schedule the Work*

Here’s where the nitty gritty time management principles come into play. If you simply use your *Project Work Plan* as a *To Do* list, you’re in trouble. Some tasks cannot start until other tasks have been completed. If you’re late on a crucial task, it will start a chain reaction that could make every task late. In some situations this could be serious. For instance, if we are late two or three days in getting our planning calendar to the printer, we could miss our scheduled time slot in the production process, and our planners could be two or three weeks late. If you’re late submitting an ad for a monthly magazine, you could miss the opportunity altogether.

To keep on schedule it is necessary to block off time in your planner to do the work. When you estimated the time needed for each task at the flow chart stage, you allowed additional time, up to 50%, to allow for interruptions or crises that might occur. This extra time is essential. Sid Kemp, in his book *Project Management Made Easy* (Entrepreneur Press, 2006), claims that when people are interrupted, they work only one-third as fast as if they are not interrupted. And everyone experiences interruptions.

In addition to the extra time allowed for each task, hopefully you also took into consideration the fact that you have more things to do than simply work on these projects. A task may only take an hour or two, even allowing for interruptions. But you may not be able to squeeze in any more than two or three of these tasks in a week. This will be reflected in the start and finish times on your *Project Manager Work Plan*. Scheduling is discussed in greater detail in the next chapter.

If you have done your planning properly, calculated the actual time for each task, and scheduled these tasks in your planner, the project should be completed on time. As project manager, it is your job to see that the times are adhered to. If others are doing the work it is important to tell them to keep you advised if it appears that a task may be running late so you can make the necessary adjustments.



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# 4 Scheduling the work

## 4.1 Using a planner for project management

Just because your work plan tells you that it will take 16 hours to complete a project doesn't mean you can complete it in two days. If you are doing the work yourself, the times you actually work on the project will depend on your other commitments. Most of us are juggling several projects, and it could be that you are only able to spend an hour or two each day working on this new project. Your work plan will indicate the number of hours that the project will take, while your planner will tell you when those hours will actually take place. Your work plan will tell you how many hours are charged to the project while your planner will determine the completion date that will be passed along to your client. If your client has a specific target date in mind, you may have to reschedule some of your other commitments, outsource some of the work or delegate to other staff or team members. Delegation is discussed in the next chapter.

You could be scheduling the various tasks in your planner at the same time that you are filling in the starting and ending dates on the Work Plan form. Or you could do the actual scheduling later. Either way you will need a planner that is suitable for scheduling projects. A planning calendar with little squares for the day simply won't cut it. I tell people in my workshops that a planner is the most important time management tool we use. And it is especially important when you use it to manage your projects.

I cringe when people call it a calendar. A calendar tells you what day it is. Heck my cell phone will tell me that. A planner tells you what you will actually accomplish during the days and weeks ahead.

Don't rely on your *Task List* to actually get the work done. A task list is like a *To Do* list. There's no actual commitment in a *To Do* list. Scheduling blocks of time in your planner to actually do the work is the way to go. A good planner allows you to do this.

If a project requires you to schedule six hours per week to complete it by the target date you would have to schedule *more* than six hours. There's no such thing as uninterrupted work, so you might schedule eight or more hours per week to allow for those unexpected interruptions or self-interruptions that are bound to occur. It varies depending on the nature of your job, but as a rule of thumb, as I mentioned before, I schedule about 50% more time than I think the job will take. That's not passed on to your client. You have already estimated the actual time it should take you to complete the task. The extra allowance is for your own emergencies, tasks *and* inefficiency.

It's a matter of self-discipline to stick to your schedule. We know it's possible because we repeatedly stick to our schedule if it's an appointment with a doctor or dentist, or a meeting or an appointment with a client or a night out with a loved one or any number of commitments that we make on a regular basis.

The one thing that is working against us is the habit we have acquired of using our planner for other people and our To Do lists for ourselves. We have to change our way of thinking. We must have as much respect for our own time as we have for other people's time.

Let's make sure we are clear as to what gets scheduled in your planner and what doesn't. Schedule only the priorities. This includes time to work on your client projects and personal projects. My definition of a priority is an activity or task that will help achieve a goal that you have set. So it is essential that you set goals for yourself in addition to the project goals or you won't know what your priorities are – although I'm sure you'd have a gut feeling of what is important and what is not. Projects are priorities since they help achieve your company goals

What planning really involves is visualizing the future you *want* and then taking the necessary action in the present in order to make that vision a reality. *Your goals are simply snapshots of the future you visualize.*

A word of caution if you're in your own business – let's say a professional organizer, consultant or professional speaker. Assume one of your goals is to bring in 'x' dollars in fees by year's end. You may have 90% of your planner scheduled with paying clients, bring in more revenue than targeted for, and believe you're a real success. But success is relative. You could be a lot more successful, even using money as a measuring stick, if you devoted less time to fee-paying clients and more time to your other goals. For example, I would have been busy my whole life, fully booked, at \$100 per hour delivering speeches or workshops. But by using speaking time to write a book, promote myself, develop materials and skills, I was able to command five times that fee, and 20 years later, 50 times that fee. Would you rather spend 10 hours or 500 hours earning enough to live on? Don't allow goals in one area to consume your whole life. Don't fill your planner with client projects.

I mentioned before that *an item on a To Do list is an intention; scheduled into your planner it becomes a commitment.* Don't let your scheduled project times be displaced by anything that is not a greater priority. And few things will be a greater priority since you have already chosen only the top priorities to schedule – namely those projects that will achieve your goals.

If I truly believe that writing a book or attending a training program or designing a time management program will help me be a success in this business, then even requests by established clients should not always be allowed to displace them.

Having said that, if you have built *flexibility* into your schedule – that is, if you have scheduled the blocks of time long before the actual deadline, and you have *discretionary time* built into that schedule – that is, free time available to be used at your discretion – then you may very well be able to accommodate another priority.

Probably the biggest stumbling block for people who have grasped the scheduling concept and attempt to practice it are those urgent items that keep appearing from nowhere. Most people do not follow a plan very well. What they spend the bulk of their time on is not the same thing they have scheduled in their planners. And that's due to an unrealistic respect for urgency. In fact many people confuse urgency with importance. When I ask in my seminars the definition of importance, I sometimes get the reply "It's those things that have to be done right away." That's the definition of urgency, not importance.

Things *could* be both urgent and *important*, but they could just as easily be urgent and *unimportant*. Important items have intrinsic value; urgent items simply have a brief time frame in which to do them. If you're not sure whether an urgent item is important, ask yourself, "What would be the impact on my business or life if I didn't do this task?" If the answer is 'nothing' or 'very little' it's probably just urgent not important. Don't let urgent, unimportant tasks interfere with your project plans.

This week's priority	Monday February 23	Tuesday February 24	Wednesday February 25
Project A	Follow ups: FF re:payables	Follow ups:	Follow ups:
Week 9	7	7	7
Things to do	30	30	30
- book seminar room	8	8	8
- place ad on website for seminar	9	9	9
- call Bill Smith re: New office chair	10	10	10
- newsletter material	11	11	11
- Order plastic mailers	12	12	12
- Yvonne re: feedback sheets	1	1	1
- Craig re: revise teleseminar	2	2	2
- Review course offerings for 2010	3	3	3
- Moneris re: bank charges	4	4	4
Personal	5	5	5
- cleaners	6	6	6
- bank line of credit	7	7	7
- Barb & Joe re: get-together	8	8	8
- carpets for living room	9	9	9
	10	10	10
	11	11	11

Exhibit 8

As far as using color for different activities is concerned that again is a personal choice. The impact on personal productivity is minimal. But in my opinion, getting too fancy is a waste of time. I do highlight my non-negotiable time in yellow, such as contracted training programs, presentations, family commitments and major projects. When airline flights are confirmed, I put a slash of yellow there as well. And I mark assignment due dates in red so they'll stand out. But that's the extent of the color I use.

Exhibit 8 shows project time scheduled in a *Taylor Planner* along with other commitments. Only about a third of the week is scheduled in advance for the various projects to allow time for other priorities, crises, and opportunities.

Below are some guidelines for using a week at a glance planner.

1. Place deadlines on all appointments and meetings. If you call an open-ended meeting, how can the attendees schedule the balance of their day?
2. Make appointments back to back. If you have an appointment to see someone from 9:15 to 9:45 a.m., and someone else asks to see you at 10 a.m., see if they can make it earlier at 9:45 a.m. This will add strength to the first appointment's deadline. It's easier to stick to a deadline when another person is waiting to see you – and it adds credibility to the comment that you'll have to stop on time since you have another commitment. A fifteen-minute period between two meetings is rarely productive even if it does materialize.



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3. If you have made an appointment with yourself to work on a large task, schedule a definite time period, say 9:15 to 10:15 a.m., but in this case, don't back it up with another appointment. If someone asks for 10:30, see if they can make it 10:45 or 11:00. This will allow you to continue with your task if you're on a roll. It also allows space to schedule last minute priorities.
4. Always schedule tasks to be completed ahead of the deadline date. If a project is due Friday, schedule it to be completed by Wednesday. This allows for any unseen problems, emergencies or the possibility of missing the deadline through illness.
5. When scheduling time for a task, always allow more time than you think that portion of the job will take. If you think it will take you one hour to complete it, schedule an hour and a half. If you plan to work on an ongoing project for an hour and a half, schedule two hours. This will provide time to accommodate those interruptions that invariably occur when engrossed in a task.
6. If you have many tasks to be scheduled in a week, always schedule the priorities nearer to the beginning of the week. Time is less available as the week passes. Also schedule the important tasks during your prime time – when your mental energy is at its peak. For most people, this is in the mornings.
7. Don't over schedule. Try not to block off any more than 50 percent of your week in advance. Leave plenty of free spaces to accommodate priorities that emerge during the week.
8. There is no limit as to how far in advance you can schedule; but blocking off time for priorities only a week or two in advance is usually sufficient. People rarely ask for appointments beyond a week or two in advance. Major activities such as vacations, conventions and celebrations can be blocked off years in advance.
9. If you're serious about getting things done, schedule the time in ink rather than in pencil. Pencil cries out that it's only tentative, and you're more likely to change it if it's more convenient for others. Have as much respect for your time as you have for everybody else's time. It may be messier to make changes to ink, but it's better to be a messy doer than a neat procrastinator.
10. Don't limit your scheduling to business-related activities. Evenings and weekends are fair game. Make commitments in your personal life by scheduling time for family, friends, and yourself.

Be sure to schedule other goal-related activities, as well as appointments, directly into your planner. "To do" lists will prevent you from forgetting all the things you have to do, but they will do nothing to further their completion. To be effective, you must schedule time to actually get the work done. One of the reasons that goals are not achieved is that people commit them to memory, but not to paper. What gets scheduled usually gets done. What gets postponed usually gets abandoned.

# 5 Effective delegation

## 5.1 What is delegation?

Many entrepreneurs find delegation difficult since they have limited staff, if any. But some projects may require that you hire someone on a part-time basis or form an alliance with an associate – or enlist volunteers.

Delegation ranges from minor assignments such as sorting through some clutter to major decision-making that impacts the success of a project or the reputation of your business. In either case, delegation is the process of sharing your job with others and holding those individuals responsible for the successful completion of the tasks assigned. You cannot hold anyone responsible for carrying out an assignment without also delegating the amount of authority needed to carry out the responsibility assigned. You cannot hold a person responsible for improving the appearance of a newsletter, for instance, without the authority to choose the typestyle, choose the colors and revise the layout. Nor can you assign the responsibility of organizing a luncheon without the authority to choose a menu and arrange the seating plan.

The more authority a staff member is given, the less involvement is required on the part of the organizer, and the greater the burden that is lifted from his/her shoulders. But the more authority a staff member has, the greater the impact that person has on the success of the business. Entrepreneurs must have confidence in their staff in order to risk delegating.

And it *is* a risk, since the entrepreneur must shoulder the blame for a job poorly done even though it may be someone else's error. The ultimate responsibility still rests with the entrepreneur.

Delegation is the greatest time saver available to business people at all levels. It frees time for more important tasks, allows you to plan more effectively and helps relieve the pressure of too many jobs, too many deadlines and too little time. Delegation actually extends results from what you can do personally to what you can control. By delegating, you can handle multiple projects simultaneously. It is also the most effective way of developing staff members. When you are delegating, you are working smarter, not harder.

We have many reasons for *not* delegating. We don't have time to train others. They can't do it as well or as quickly as we can. We're afraid they might goof. But in many cases these reasons are simply excuses. Sure it will take time to train people. However, every hour invested now will bring you hundreds of free hours in the future. It's unlikely our staff members can do as good a job as we can. But how about when we first started? We weren't always as good at our jobs as we are now. Be willing to accept less at first. As people become more experienced, the workmanship will improve. They'll goof. Everyone makes mistakes. But that's the price we have to pay in order to free up our time, develop our staff members, and expand our effectiveness.

What jobs should we delegate? Initially you may want to delegate all or a portion of the administrative tasks to a staff person so you can devote full time to client projects. The things you delegate need not be related to any specific project. If you hire an administrative assistant, either full or part-time, a good starting place is to list all the jobs you do on a recurring basis, no matter how small. Then look for those jobs that take the biggest chunks of time. If they require little training, great. But if you must train, schedule time to do it. Perhaps a half hour each day or two hours each week. Set the time aside and stick to a regular schedule. Time you spend now will pay big dividends later, as it frees up time for you to spend on the more profitable projects.

You may not want to delegate critical jobs that could endanger the success of a project; nor jobs that involve confidential information. But there are probably many jobs that someone else could do for you.

One of the roles of an entrepreneur is that of a manager. Managers get things done through other people. A manager plans, organizes, staffs, directs, controls, innovates. But a manager does not get bogged down in jobs that someone else can do.

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## 5.2 Principles of delegation

Improper delegation is worse than no delegation at all. It not only creates a greater demand on your own time, but messes up your staff members' time as well. Be careful what you delegate, how you delegate, and to whom you delegate. Here are a few ground rules for effective delegation:

*Don't delegate what you can eliminate.* If it's not important enough for you to do personally, it's probably not important enough for your people to do either. Respect their time and their ability. Don't waste it on non-productive or unprofitable trivia. Your success can be multiplied a thousand times if you concentrate on the high-return jobs and encourage your people to do likewise – don't spoil it by using your staff as a dumping ground for “garbage” jobs.

*Delegate the things you don't want to delegate.* We tend to hang on to the things we like doing, even when they interfere with more important tasks, and even though a staff member could probably do them just as well. Share the interesting work with your staff. One of the most important advantages of effective delegation is the fact that it enriches your employees' jobs. Don't limit your delegation to the boring, repetitive tasks – look for the interesting ones as well.

*Delegate, don't abdicate.* Dumping jobs onto your staff and then disappearing is not delegation – it's organizational suicide. Delegation must be planned. Consult with your staff members or part-time workers first; select people you think are capable of doing the job and would like to do the job. Train them. Delegate gradually, insist on feedback, and then leave them alone.

*Delegate the objective, not the procedure.* One of the bonuses you receive from effective delegation is the fact that in many cases the job is done better in the hands of someone else. Don't resent it, encourage it. Delegate the whole task for specific results de-emphasizing the actual procedure. Your staff members, under less pressure, less harried, and with a fresh viewpoint, will likely improve upon the method you've been using. Review results, not the manner in which he or she arrived at them!

*Don't always delegate to the most capable people.* Delegation is one of the most effective methods of developing your people. Don't continually delegate to the most capable ones, or they'll get stronger, while the weak ones get weaker. Take the extra effort to spread delegation across the board to develop a strong team with no weak links.

*Trust your staff.* Be sure to delegate the authority as well as the responsibility. Don't continually look over their shoulders, interfere with their methods, or jump on them when they make mistakes. Be prepared to trade short-term errors for long-term results. Maintain control without stifling initiative.

Henry Ford is claimed to have said, “If anyone is indispensable, fire him.” A little extreme perhaps; but it does get the message across that people who do not delegate actually impede an organization’s progress. If you hog all the information for yourself and refuse to delegate, quite possibly you can’t be replaced. But your organization won’t grow either.

One of the goals of every entrepreneur should be to train someone else to replace him or her. In larger organizations, failure to do this blocks the possibility of promotion at all levels in the organization, and stifles initiative. In smaller organizations, not doing this hampers growth and leaves no one qualified to take over if you are suddenly absent or incapacitated in some way. And retirement becomes a difficult process. Training of others and systematic delegation should be one of your goals.

### 5.3 Assume you have an excellent staff

You have probably heard about the experiment where average students were introduced to a teacher as hand-picked, high-I.Q. students. The teacher was told that these particular students could be expected to show dramatic improvements over the course of the school year. And since the teacher expected great things from these “special” students, they received great things. The students improved remarkably. It’s the old self-fulfilling prophecy at work. Expect little and you’ll get little; expect much and you’ll get much. If you mentally label your staff as incompetent and not worth the time to train, they won’t disappoint you. But if you approach them as though they were hand-picked, high I.Q. people who were capable of great achievements, you have a completely different calibre of person on your staff.

If “stupid” people make an error it’s obviously because they misinterpreted your instructions or weren’t capable of carrying them out. But if “clever” people make an error, there’s a possibility that you didn’t explain it properly, or they met an unforeseeable roadblock. Always assume you have “clever” staff members. And when things go wrong, look to yourself for the reason. Did you explain the situation properly? Did you rush through the instructions? Did you forget to warn the person about those exceptional circumstances that might occur? Did you mistakenly take certain prior knowledge for granted? Were your instructions ambiguous?

If you find yourself blameless, then there’s only one possible answer. Even clever, superior staff members slip up once in a while. It might even have happened to yourself on occasion. So see it as it is – an honest error that could have happened to anyone. Don’t get upset, point the blame, or berate the person. Nothing you can do now can turn back the clock and prevent the error from happening. It has already happened. But you *can* help prevent the same error from recurring. You *can* make it a learning experience for the staff member. And you *can* protect the person’s self-esteem. How? By condemning the error, but not the person who made it.

Always give your people the benefit of the doubt. Few would make a mistake on purpose. And when they do make a mistake, their self-image suffers. What they need at this point is not your criticism, but your assurance. Help build up their self-confidence. Let them know that you're not blaming them for the mistake and that it could have happened to anyone. Then ask them if they have any suggestions as to "how we can reduce the chances of this happening again".

People learn from their mistakes. *What* they learn is up to you. They could learn that making mistakes is painful and demeaning and that they shouldn't take risks. Or they could learn that if they do make an error they should try to bury it so they don't get raked over the coals. However, they could learn that to err is human and the name of the game is to make as few mistakes as possible, to learn from the mistakes that do occur, and to continue to strive to be creative and innovative.

Assume your staff members are a hand-picked group of clever, creative, dedicated individuals. Eventually you may prove yourself to be right.



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## 5.4 Using your assistant's time wisely

If you have an administrative assistant, she or he could be your most important delegatee. By the very nature of the job, she is probably already the dumping ground for a myriad of tasks and victim of countless interruptions; the desperate salesperson trying to reach you, the harried associate dropping off a projector that she had borrowed, an irate client convinced that you are trying to avoid her. The staff assistant sits precariously in the line of fire. It is essential that you meet with him or her early in the day to discuss one another's schedules and set priorities. Make her a part of the management team. Provide the necessary time management tools and training. Delegate challenging and meaningful tasks and encourage her to suggest ways current procedures, tasks and reports could be eliminated, abbreviated or improved.

Don't be a perfectionist when managing your assistant. While it's important that any work for a client be top quality, remember that by spending unnecessary time on a task, other high pay-off activities may be short-changed.

Communicate. The more an assistant knows, the more he or she will be able to help you. A knowledgeable assistant can save you hours each week by providing information to callers and visitors without having to disturb you. When you attend a conference or take a vacation, spend some time briefing your assistant on matters that are likely to occur during your absence.

Above all, set a good example and show respect for your assistant's time. Plan your day. Accumulate the non-urgent requests instead of interrupting him/her frequently. Keep a folder to house assignments of lesser importance for later review. Place realistic deadlines on all tasks. Respect the assistant's time as well as your own.

# 6 Communicate clearly

## 6.1 The importance of communication

It is important that you have an accurate record of the communication that takes place while the project is in progress. This includes the planning stage. Make sure you write down promised delivery dates, commitments and costs. You could use a *Communications Log*, as shown in Exhibit 9, for this purpose. Put a check mark next to the appropriate icon to indicate whether the information was received or given in person, via the telephone, fax, email or snail mail. Indicate the date, time and brief summary of the interaction. This form is similar to a telephone log except that it is used for all types of communication. It takes a minute or less to copy information onto this form and you will have everything in one place. Exhibit 9 shows one page of a communications log being used for a vendor.

**TAYLOR** Project Manager - Communications Log

Name / Company <i>Print One</i>			
Address <i>2421 Beaver Lake Dr. #102</i>			
Telephone <i>416-905-9051</i>		Mobile _____	
eMail <i>info@printone.ca</i>		Fax <i>416-905-9000</i>	
Project: <i>Time Management Workshop</i>			
Date / Time		Discussion	Action
<i>June 10 9:30am</i>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> @ <input type="checkbox"/> Fax <input type="checkbox"/> <input type="checkbox"/> Other	<i>quote on 2000 flyers, 8.5x11 folded, 2 sides \$168.00 + taxes</i>	<i>check actual quantity received ✓</i>
<i>June 10 11:00am</i>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> @ <input type="checkbox"/> Fax <input type="checkbox"/> <input type="checkbox"/> Other	<i>artwork sent for flyer ordered 2,300 for june 14</i>	
<i>June 12 10am</i>	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> @ <input type="checkbox"/> Fax <input type="checkbox"/> <input type="checkbox"/> Other	<i>send original copy of notes. 25 pgs, 25 copies for june 17</i>	
<i>June 17 9:45am</i>	<input checked="" type="checkbox"/> <input type="checkbox"/> @ <input type="checkbox"/> Fax <input type="checkbox"/> <input type="checkbox"/> Other	<i>printing ready</i>	<i>pick up this afternoon ✓</i>
<i>June 22 2:30pm</i>	<input checked="" type="checkbox"/> <input type="checkbox"/> @ <input type="checkbox"/> Fax <input type="checkbox"/> <input type="checkbox"/> Other	<i>quote on 12pg. booklet on "time tips" (will fax later today)</i>	<i>prepare text and layout ✓</i>

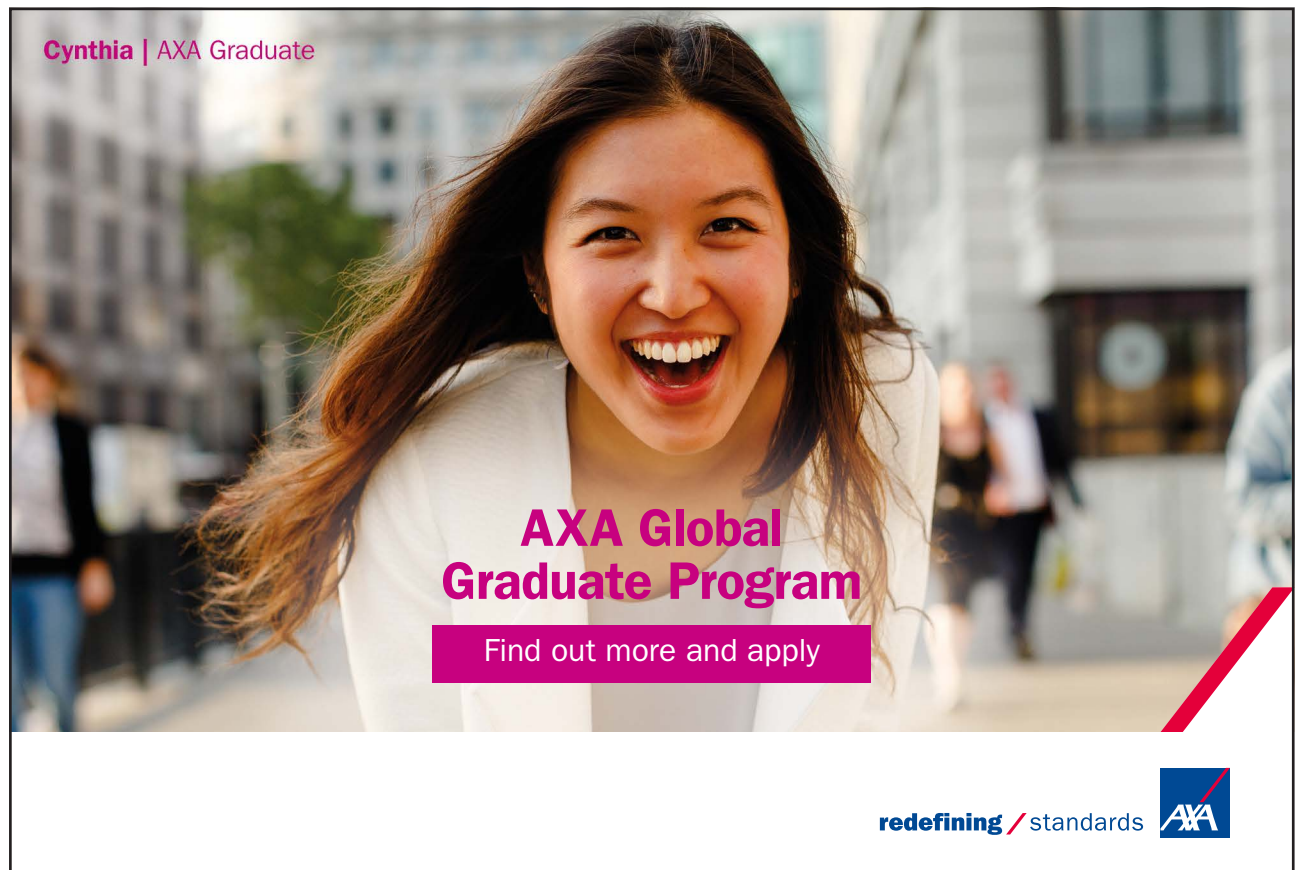
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**Exhibit 9**

One of the first principles I learned when I studied time management was that of writing things down. People overestimate their power of recall. Just because we recall vividly five minutes later that the quote we received verbally was \$86 per 100, doesn't mean that figure will pop into our mind as readily a few weeks later. Nor does it insure that the vendor will agree with the recalled figure even if it's accurate. A client may ask for one thing, and three weeks later may swear they asked for something completely different. Not that they're trying to deceive us, but simply because people's natural powers of recall are not that great. Add a hectic environment, a stressful situation and a Type A personality, and memory is further diminished.

Few people will disagree that it pays to make notes at the time the exchange of information is taking place. But the principle goes beyond simply writing it down. We have to be able to locate it and interpret it at the time we need it. So it has to be recorded in an organized manner and retained in a place where we can readily access it. That's the purpose of the *Communications Log*. All *Communication Log* forms are retained in a *Project Manager* binder, along with the forms already described so that everything is together in one place and can be referred to easily. Dividers and tabs separate the various sections. When a project is complete, all forms relating to that project can be removed, stapled together in sets, and filed in a manila file folder bearing the project name and date.

The binder, or as I call it, the *Project Manager*, can then be used for the next project or projects. The information should be portable so you can take it with you when you travel or visit the client.



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Usually communications are taking place between you and a staff member, vendor, associate or other individual involved in the project on an ongoing basis. Keep a separate form for each person and you will have a chronological record of all information flowing between you and that person.

The form will provide you with a record of time and cost estimates for your flow charts and work plans. It will provide accurate contact information for those people you will be dealing with on similar projects. It also pinpoints responsibility if the project hits a snag because someone has not held to their part of the bargain. It's amazing how an individual's recollection is completely different from that on the *Communication Log* when a problem occurs. The habit of recording everything on this form relieves you of the stress of having to recall information by rote or searching for information among faxes or scraps of paper or in past emails. The time saved by not having to search for information more than compensates for the time taken to copy information onto this form from other sources. Information from personal visits, meetings and telephone calls can be recorded in real time.

## 6.2 Communication checklist for delegation

It is important to communicate clearly when you are delegating tasks to a member of your staff or others. Delegation was covered in Chapter 5, but here is a checklist suggesting some of the things that should be covered. Think of other items that could be included and make up your own checklist.

- Exact date the employee is to assume the new responsibility and the duration of this new assignment.
- The purpose of the task and how it relates to the overall project.
- A detailed explanation of how the task is currently done, if in fact, it is.
- A comment to the effect that you welcome any suggestions as to how the method can be improved.
- An explanation of the various resources and sources of information available to the employee should he or she encounter problems.
- A summary of the types of problems encountered in the past and how they were handled.
- An explanation of any unusual circumstances or problem areas that might arise in the future.
- The limits of the employee's authority. Which types of decisions are to be made by him or her and which ones have to be referred to you.
- Any new reporting relationships and lines of communication involved in the new assignment.
- The type and frequency of feedback expected.
- How the employee's performance will be evaluated.

### 6.3 Take time to listen

An ancient tribe of American Indians had a proverb, “Listen, or thy tongue will keep thee deaf.” In spite of all the books and seminars available on effective listening, few people take the trouble to really understand what a person is saying. Dale Galloway, in his book, *Confidence Without Conceit*, points out that the more authority people get, the less they are forced to listen to others. And yet their need to listen is even greater, since they have to depend on others for their information.

Entrepreneurs are busy people. And the busier you get the less patience you may have when it comes to listening to your clients and others. It isn’t easy to devote full attention to someone sitting in front of you. There is a tendency to mentally review what you just did or said during the initial stage of the meeting. Or reflect on the items that you still want to raise with the client concerning the project in question. There is so much to cover, and so little time. The important thing to remember is that listening does not *waste* time, it *saves* time. It’s no wonder the Bible tells us that everyone should be “quick to listen, slow to speak, and slow to become angry.” For anger and speaking frequently both get us into trouble as well as consume a lot of time. But how many times does listening to others get us into trouble? Listening is a critical part of the communication process. Ineffective listening can cause errors, misunderstandings, broken relationships, and even tragedies. Like planning, listening takes time initially, but frees up more time later by preventing time-consuming and costly errors from occurring during the various stages of a project.

Listening not only saves time, improves communications and prevents errors, it also improves morale. Everyone likes to be heard. Being ignored is demeaning. It’s even worse when someone pretends to listen while staring blankly through the person, thoughts on some other pressing problem. You can’t fake it. You have to be genuinely interested in the person and what he or she is saying. It can’t be rushed. “Haste makes waste” is as true for listening as it is for anything else. If you honestly don’t have the time at that precise moment to really listen to someone, be honest with the person and with yourself and say so. Schedule a session later when you can devote adequate time to the process.

Listening is a skill that can be developed, according to John Drakeford, author of *The Awesome Power of Positive Attention* published by Broadman Press back in 1990. He suggested an acrostic for the word “listen” to remind us what the listening process is all about:

- Learn the truth about listening.
- Investigate the difference between hearing and listening.
- Show your interest in every way.
- Tame unruly emotions.
- Eliminate side excursions.
- Never interrupt.

The fact is that effective listening is not related to intelligence or the amount of reading we do. Nor is the skill developed automatically as we grow older. Hearing is not the same as listening. To quote Drakeford, “The word *hear* describes the process whereby a sound comes through the air to your ear, where it is changed to neural current and transmitted to the brain. The word *listening* is used for the process whereby we sort the messages and decide which stimulus will have our attention.”

Showing your interest in every way refers to utilizing every part of your body – mouth, eyes, etc., to make the other person feel loved, valued and worthwhile. It is also important not to react emotionally to “red flag” words that could disrupt communications. And not to drift into other thoughts while the person is speaking. This is difficult, since the average person speaks at about 125 words per minute, while we can listen at 4 or 5 times that speed. With all this spare time to kill, our mind wanders, daydreams, takes little mental excursions and frequently doesn’t get back to the speaker in time. We miss points, meanings. We guess, misinterpret. We can’t slow down our thinking process, but we can utilize the spare time more effectively. The secret is to *stay with the speaker*. Review and mentally summarize what he has said. Listen between the lines, look for those non-verbal communications. Weigh the evidence being used to support his points. But stick with him. Don’t drift into space or start formulating your own reply while he’s still speaking.

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Equally difficult is to avoid interrupting. People have a natural tendency to jump in with additional information, correct an error they have noticed, or make a point while it's fresh in their minds. It takes self-discipline to listen attentively, recognizing that your turn will come, especially for "Type A" people who find waiting sheer agony. Or for intolerant people who can't stand to sit quietly while someone rambles on about something they consider to be complete nonsense.

It's true that we cannot learn anything new while we're talking while much can be learned by listening. It's equally true that it's much easier to relate to someone and build interpersonal relationships by listening to what they have to say. But the fact still remains that effective listening is a skill that has to be developed through practice. Slowing down and giving someone your undivided attention consumes time, but it is time well spent.

Listening is the most powerful tool in the communication process. And one that every entrepreneur must develop. Stephen Covey sums up the attitude we should have when he says in his book, *The 7 Habits of Highly Effective People*, "Seek first to understand and then to be understood."

#### 6.4 Be an active listener

Active listening will help avoid conflict and improve communications. Lean forward to demonstrate your interest in the speaker. Establish eye contact. Resist the temptation to glance at your watch or the door. Devote full attention to the speaker. Don't make judgmental or negative statements. But avoid complete silence as well. The lack of any response suggests you aren't listening. Ask for clarification. Summarize key points and ask if you've interpreted them correctly. Listen for ideas, not details. But hear the person out. Most people are flattered when you listen to them. They respond positively, respect you more. And *your* ideas then tend to have greater influence.

We tend to be too quick to speak, often evaluating or judging others' ideas. Communication cannot take place unless we listen effectively. Often we find ourselves arguing over minor points when in reality we are close to being in agreement, simply because we haven't listened to each other.

Always dwell on what the other person says before responding. Active listening involves paraphrasing what you think the other person said. This gives the person an opportunity to clarify it or modify it or confirm that your interpretation of what was said is entirely accurate. Be sure to empathize with others. Put yourself in their shoes and try to understand why they believe what they do. If you cannot for the life of you understand why they would ever think the way they do, at least admit that they have a right to think that way. Hearing them out may lead to understanding, but bursting in with your own beliefs, with no attempt to see things from their point of view, is inviting conflict.

## 6.5 Handling conflict

It is the leadership of the entrepreneur that determines the direction of any project, and it is imperative that you develop a comfortable expertise in handling conflict. Otherwise, antagonism and frayed relationships will cripple any cooperative effort. If you want to change a person's point of view, direct confrontation rarely works. For every action there's an equal and opposite reaction, and trying to force your opinion on someone else will simply cause him/her to resist all the more. When met with resistance, most people push harder. They augment their arguments with facts and figures, examples, and supportive quotes, trying to overwhelm the other person with the rightness of their point of view. Unfortunately, instead of breaking down the other's resistance, it only serves to strengthen it.

You cannot change another person; the person has to change herself. But you can help the person change by being on her side instead of in opposition. This does not mean you have to agree with the person's idea or opinion or plan if you feel it's wrong. But you should be able to agree with something the person said. Find a common meeting ground and start the discussion with a point you both agree on. In this way you are seen as a friend, not a foe. And by being willing to change yourself a little, you are encouraging the other person to change a little in return.

Jerry Richardson and Noel Marculis, in their book, *The Magic of Rapport: The Business of Negotiation* (Avon, 1984) refer to this as "pacing". You are pacing someone when you are in agreement or alignment with him. It is a way of establishing rapport with another person. People like people who agree with them and are friendly towards them. And when people like you they tend to agree with you. Once you are "on their side" and supporting an idea that is common to all of you, you are in a position to suggest other options. You can lead them in a different direction.

For example, if someone in a meeting makes an emotional appeal to completely change a current filing system and cites disadvantage upon disadvantage (imagined or otherwise) of the proposed system, don't oppose him/her directly even if you are just as adamant that the current system should remain intact. Open by honestly saying that if you were her you would probably feel the same way (naturally you would if you were her). Reinforce your rapport with her by picking one of the disadvantages cited that you agree with. "You are absolutely right when you say it puts an added burden on the department heads, Judy." Then, after discussing that point for awhile, you might ask "Is there any way we could possibly get around these disadvantages without actually scrapping the system altogether?" You are not seen as "the enemy" trying to oppose her idea, but as a friend who recognizes the validity of his arguments and is willing to make changes. You may, in fact, end up with the current system still intact, with slight modifications. And a bonus of having someone supporting the current system who was previously undermining it at every opportunity.

# 7 Maximize your networking opportunities

## 7.1 The project manager's networking responsibilities

You may be an experienced project manager; but if you don't have any projects to manage, it won't be very profitable. As an entrepreneur you are responsible for generating business for your company. One of the least expensive, yet effective methods of attracting business, is through networking.

A dictionary definition of networking is "the exchanging of information and experience for professional or social purposes." But it's more than just exchanging information. It's developing relationships. And to be successful as a professional organizer you must develop relationships with those who can assist in locating information, contacts and prospects as well as giving advice on projects and tasks. This isn't to say that with everyone you meet you determine whether that person can help your career, and if not, move on. We have our relatives, friends and acquaintances that we socialize with and have fun together. And some of those business people that we network with may eventually become close friends as well.



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But purposeful networking is an effective strategy to help you expand your business or further your career. Those who don't have a networking plan are seriously limiting their potential for success. Seventy percent of all jobs, for instance, are not found from answering want ads or sending out resumes, but by networking. Most of the people that I have hired during my lifetime were from referrals from other people who knew I was looking for someone with specific qualifications. And many of my client projects were from referrals as well.

The more people you meet through networking, the more effective you will be. We meet a lot of people simply by going about our daily routine. But we should also have a plan. To start with you should join two associations, a peer group, and one whose members represent your target market.

## 7.2 Involvement is the key

Joining associations is not enough. You must attend their monthly meetings and other functions as often as possible. The more visible you are, the more contacts you will make and the more chance you have of getting referral business and help with existing business. Don't join too many associations. You simply won't have the time to network properly. There is little reward for having your name listed in a membership roster.

Arrive at every meeting a little early so you meet people as they arrive. Overcome your reluctance to start up a conversation. I realize that some people are more extroverted than others, but you can overcome any fear simply by realizing that they are just as anxious to talk to you. The more you network, the easier it becomes.

Of course you must prepare ahead of time. Have plenty of business cards and one-page leaflets or folders describing your product or service. And memorize an "elevator speech" – a brief description of what you do for a living. When someone asks what you do, don't simply say you're an accountant or a workshop leader or a professional organizer. Tell them that you help business managers to become more personally productive by training them in the principles of time management so that they can get all the important things done without a lot of stress or excessive hours – or whatever. Keep it less than 10 seconds in length but include the name of your company, the specific service that you provide and the benefit of this service to your target market.

### 7.3 Be sensitive to others

Don't thrust a business card at someone the moment you meet. Wait until they ask for it or leave it until the end as you are leaving them. I belong to the *National Speakers Association* and I'm amused by the number of eager members who stick a business card in my face and give their "elevator speech" before they have even met me. Ironically this happens most frequently when I get on an elevator and several members are already there. I suppose they think that this is what an "elevator speech" is all about. But it simply puts people off. You have to earn the right to promote yourself by first showing a genuine interest in the person. Networking is a give and take process – with more giving than taking. Ask what *they* do and what *their* needs are. Offer advice, contacts or whatever is appropriate. You are selling *yourself*, not your company or your products or services. In fact the small talk near the start of your conversation is the important stuff – their family, hobbies, sports interests etc. Let the other person do most of the talking. Be a good listener. Make eye contact. Don't glance at your watch or scan the room to see who else is there. Give your full attention to the person you're talking to.

When I first joined one association, I recall speaking to several long-time members who, once they discovered I was a novice with little to offer, started looking over my shoulder to see who else was there who could be more important to talk to. They obviously weren't listening to me and were simply looking for an excuse to move on. *Now* that I'm an experienced and long-time member with hopefully a lot to offer I still remember those people, and I'm not too enthusiastic about recommending them to my clients.

Don't expect to get business or assistance as soon as you talk to someone. Remember, networking is about building relationships. They must know you and trust you first. Even in a direct selling situation, prospects buy *you* first and then your product or service.

Listen more than you talk. You learn nothing new when you talk, only when you listen. Be more interested than interesting.

### 7.4 Names are important

If you're going to build relationships you had better be good at remembering names. They won't always be wearing a nametag. You can improve by listening carefully to the name when first introduced. The tendency is to think about what you are going to say rather than listen intently to them, so break the habit. If you don't hear the name, ask them to repeat it. It may be embarrassing to have to ask two or three times, but it's not as embarrassing as not knowing who they are at the end of the conversation. Some people talk quickly or have an accent or slur their words. Never be embarrassed about asking them to repeat or even spell their name. They will be flattered that you are interested in them. And people love the sound of their own name.

When you hear their name, immediately say it aloud. “Glad to meet you John.” Saying it aloud helps get it into your long-term memory. Say it silently to yourself. And use it during the conversation. “How long have you been a member, John?” Say it aloud again when you leave him or her. And then write it down afterwards if you don’t have their business card.

But don’t you be caught without business cards. When you design your business card, make the print large enough to see without squinting. Include all your contact information. If your name is difficult to pronounce, you might even include a phonetic spelling in brackets beneath the name. Make it as easy as possible for people to remember you and contact you. Use the back of the card to list your products or services. You might even include a map showing how to get to your office.

A photograph on the front will make it easier for them to remember you. Include your company logo. Choose a clear readable font and don’t let your card look cluttered. Some people try to cram too much onto one side.

The networking doesn’t end when the conversation does. Follow-up with those you’ve met. A brief e-mail indicating how great it was to meet them is sufficient. Hopefully you have jotted down their interests following your meeting so you can send them some information. Perhaps a link to an article you have read online. Everyone you meet and befriend may not be a prospect for your services or a mentor or a sounding board. But they all know a hundred or more other people who might be.



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## 7.5 Networking starts before the meeting

When you attend an annual conference, plan ahead. Review the pre-conference registration list and see who'll be attending. Highlight those you want to touch base with. Send an e-mail to those key people indicating your common interests and your desire to meet them. You may be able to arrange a time to meet, or at least an agreement that you will search out each other during the conference. Some people review the final registrations list *after* the conference and are disappointed that there were people there that they would have liked to have met.

Choose those sessions that are really important to attend and schedule them into your planner. Then network while the other sessions are taking place. There are always people milling around the registration desk, exhibits or recording table. Introduce yourself and remember the old adage, *they don't care how much you know until they know how much you care*.

## 7.6 Be prepared when attending events

When attending workshops, whether they are sponsored by one of your associations or not, arrive early. This is an excellent opportunity to meet a knowledgeable instructor and keen participants in a closed environment. The smaller the group the better, because it gives you a chance to learn more about the people there – before the sessions, during the sessions, during the breaks, and after the workshop is over.

Pay particular attention if the instructor makes the rounds with introductions. People are usually so busy thinking about what they are going to say themselves that they don't hear the information given by the other participants. If you have your "elevator speech" memorized and have thought about your objectives in attending the workshop, your mind is free to just listen. Listen to the names, and jot them down as you hear them. Determine who you would most like to meet, based on what they say about themselves and their job. And strike up a conversation with them during the breaks. Don't forget to bring your business cards and folders with you.

The opportunities for networking are unlimited, not only at association meetings, conferences and workshops, but at social events, neighborhood get-togethers, company meetings, plant tours and Christmas parties. Everywhere you go, there's an opportunity to meet people – restaurants, banks, the library, grocery store – you name it. Networking simply involves meeting people and building relationships. But you are prepared in the event that the conversation turns to business. You may be the one to direct it that way if you feel it's appropriate. Some relationships will be short-lived, but that's okay. As you become a "people person", sensitive to the likes, dislikes and needs of others, you will make many friends and acquaintances. It's important not to take advantage of these relationships by giving a hard sell. Be patient. It takes time. Don't be like a butterfly skipping from one flower to the next. When you're with someone, be there mentally as well. Even if there is no chance of getting business referrals or advice from them – at least you'll make a friend. And that's important.

## 7.7 Key strategies for successful networking

Business can come from the most unlikely places such as meeting a vice-president of a major corporation on the tennis court or having a magazine publisher in the audience while making a presentation.

The more active and visible you are, the more contacts you will make. Jump at the chance to make speeches, write articles or volunteer for committees. Submit items to association newsletters, church bulletins, or community newspapers. Spend less time watching TV and more time in group activities and participating in social media such as Facebook and Twitter. Also consider joining Ski clubs, bridge clubs, city tours – they are all opportunities to meet people and network.

I'll close this chapter by summarizing the key points in successful networking.

1. Number one is to have the right attitude. Don't attend a meeting with a negative outlook, thinking, oh boy another evening wasted. Know you will meet some interesting people there. And have a giving attitude. Plan to help others more than they will help you.
2. Don't discriminate. I don't mean you should not seek out those that you think can help you. That's your goal. But once you are talking to someone, be as attentive and gracious as possible. Don't be abrupt or discourteous simply because you feel they have nothing to offer. They may have been brought into your life for a reason.

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3. Have a plan. Think in advance about who will be there and how you will seek them out. Write down any questions you want to ask. What do you want to accomplish at the first meeting. Do you have information to bring along that you think will be of interest to them?
4. Prepare in advance. Have plenty of business cards and folders describing your services. If you have written a book, bring a copy with you. I don't mean walk around with a book in your hand, handing out business cards and leaflets. But have them with you – in your pocket, handbag, computer bag or whatever you have with you. And use them when the opportunity arises. You might create some useful giveaways – promotional items that have a use. I used to carry a pocketful of small retractable blades for clipping articles. They were shaped like a key and inscribed with the words “Time is Life. Get Organized. Call 1-800-000-000.” Every time someone was struggling to open a carton or tear an article from a magazine, I'd give them one of the clippers.
5. Practice listening. I say this because most people I meet are poor listeners. I suppose that's why there are workshops on active listening. When you do the talking you only hear what you already know.
6. Be good with names. This ties into effective listening but there are also workshops on memorizing names and faces. Include one in your self-development plan. People you remember will remember you.
7. Dress appropriately. Dress comfortably but not sloppily. Don't wear jeans if it's a black tie affair. I had a rule as a professional speaker to always dress one level above the audience. It's true that you don't get a second chance to make a first impression. And first impressions are important. Straggly hair and dirty fingernails don't seem to attract people. If you don't know how people will be dressed, ask. *Someone* has to be sponsoring the event.
8. Take the initiative. Don't wait for someone to approach you. Introduce yourself. Initiate the conversation. You can attend all the events you want but you won't achieve anything if you stand in a corner by yourself all the time. And meet someone new. Don't spend all your time with the same people at every meeting you attend. If you are at a dinner meeting, be the one to initiate introductions at your table. Be the unofficial table host.
9. Have something to say. It pays to prepare an “elevator” speech. But keep current on the world around you. Scan the morning newspaper for the topical events. Be familiar enough with sports that you know they don't play hockey with a ball – unless its ball hockey! In other words, be prepared to participate in conversations that don't relate to business.
10. Most important is the follow-up. If you skip this step, most of your time will have been wasted. Keep index cards or a database on the people you meet. Record their interests as well as their business and contact information. Be a clip artist and scan and email information that you get from magazines and newspapers. Even if they have already read it, they will appreciate the thought. Periodically review the people in your database so you will remember their names. Don't forget to send off a “great to meet you” e-mail immediately after the event.

Networking is fun. You are meeting interesting people, expanding your horizons, and growing your business as well as building a resource center for assistance on many of your projects. Sharing ideas with others is probably more effective than any self-development course you could take. But like anything else, you must keep it in balance. You don't want to be out every night networking with business people. You need time to "network" with your family as well.

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## 9 About the author

**Harold Taylor, CSP**, CEO of Harold Taylor Time Consultants Ltd., has been speaking, writing and conducting training programs on the topic of effective time management for over 30 years. He has written 18 books, including a Canadian bestseller, *Making Time Work for You*. He has developed over 50 time management products, including the popular *Taylor Planner*, which has sold in 38 countries around the world. He has had over 300 articles accepted for publication.

A past director of the *National Association of Professional Organizers*, Harold Taylor received their *Founder's Award* in 1999 for outstanding contributions to the organizing profession. He received the CSP (Certified Speaking Professional) designation in 1987 from the *National Speakers Association*. In 1998 the *Canadian Association of Professional Speakers* inducted him into the Canadian Speaking Hall of Fame. And in 2001, he received the first *Founder's Award* from the *Professional Organizers in Canada*. The award has been named in his honor.

In 2014, Harold formed an Internet training company, *mindsontime.com*, to conduct mastermind programs, teleseminars and webinars on time management, organizing and leadership – with a focus on the application of recent research findings to increase personal productivity and well-being.

Since 1981, when he incorporated the original time management company, he has personally presented over 2000 workshops, speeches and keynotes on the topic of time and life management.