

PLANNING AND ORGANIZATIONAL SKILLS

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1 THE OBJECTIVE – WHAT YOU WILL LEARN

In this session, you will learn:

- How to improve your organizational skills and get things done;
- To structure your time better and effectively delegate task to others;
- How to use simple tools in order to improve your decision making and problem-solving process while planning and organizing around set goals, personal or professional.

EXERCISE

Before we dive into the content, please take a few moments and think about these two questions:

1. What one thing you could do (which you are not doing right now) that if you did on regular basis, would make a tremendous positive difference in your personal life?
2. What one thing in your business or professional life would bring similar results?

Write down the answers and you will come back to them a bit later.

2 WHY YOU NEED TO PLAN

If we speak metaphorically, planning is like a roadmap that guides you how to complete a task. Good planning/organizing skills give you the ability to get things done in a more structured way. You have more control over the tasks and time available to implement them, and can organize yourself and others better in order to be more effective and consistent in achieving the set goals.

How can you personally and professionally benefit from effective planning?

- **Planning reduces risks and oversight** – Planning minimizes possibilities of risk and uncontrollable uncertainties for the future.
- **Planning makes controlling easier** – Planning does not only mean thinking about the future but also acting upon it. With planning, you identify effective ways for attaining set goals. These effective ways for planning can be determined by forecasting.

- **Planning enables creativity and innovation** – Planning enables identifying the best alternatives out of many options and encourages you to put effort into discovering new ideas that support your goals and objectives.
- **Planning facilitates decision-making** – Planning means determining in advance the actions and resources (human and physical) required to reach a goal. It facilitates decision-making by selecting the most feasible course of action and resources that could lead to your goals.
- **Planning increases personal effectiveness** – Effectiveness is related to the extent to which you are able to accomplish your goals by efficiently allocating all resources.
- **Planning provides direction** – The planning process clearly defines and maps out the guidelines for ensuring smooth operations and activities in order to achieve set objectives.

3 EISENHOWER MATRIX

Eisenhower Matrix is a very simple, yet effective tool for prioritizing your personal and professional activities based on the level of their **urgency and importance**. Using this tool, you will be able to identify activities that you should focus on, as well as activities you should ignore. First, let us see the difference between tasks that are urgent and those that are important.

3.1 Urgent vs Important

We use and organize our time based on urgency and/or importance of tasks. What does it mean that something is urgent? How do we define importance? What is the difference between the two?

URGENT – WHAT DO YOU HAVE TO DO?	IMPORTANT – WHAT DO YOU WANT TO DO?
<ul style="list-style-type: none"> • Urgent matters demand your immediate attention and action – you react/respond on urgent things; • They press on you and can put you in defensive, negative mode; • Usually they are visible and easy to do; • Most of the time they are set by others – by doing urgent tasks usually you are contributing to someone else’s goals; • Consequences of not dealing with them are immediate. 	<ul style="list-style-type: none"> • Important things usually contribute to your values and high priority/long term goals; • They require more proactivity from you – you need to take initiative and act to make things happen; • Usually they are less tangible; • Focusing on important matters keep you calm, collective and inventive.

We are easily diverted into responding to the urgent matters and postponing the important ones if we are not clear what goals/results we want to achieve.

According to the Eisenhower Matrix, you can manage your time in 4 different ways (4 quadrants).

What kind of activities fall into each quadrant based on their urgency and importance:

	URGENT	NOT URGENT
I M P O R T A N T	I URGENT AND IMPORTANT - CRISES ACTIVITIES: <ul style="list-style-type: none"> • Crises • Pressing problems • Deadlines • Equipment breakdowns • Client complaints Activities that became emergencies because you could not predict them or because you left them until the last minute. <i>Do them now!</i>	II IMPORTANT BUT NOT URGENT – PLANS ACTIVITIES: <ul style="list-style-type: none"> • Prevention • Relationship and team building • Recognizing the opportunities and not challenges • Long term planning • Risk analysis • Creating a budget • Education and training • Recreation (taking care of physical and mental health)

		<p>Activities that contribute to your long and mid-term goals. Typically, they are not pressing for attention, so you often neglect them to deal with urgent issues. <i>Plan them well!</i></p>
<p>N O T I M P O R T A N T</p>	<p>III URGENT BUT NOT IMPORTANT - INTERRUPTIONS</p> <p>ACTIVITIES:</p> <ul style="list-style-type: none"> ● Interruptions ● Some calls, emails and reports ● Regular meetings ● Requests form others ● Tasks that »we have always done this way« and are ineffective ● Popular activities <p>Activities that are urgent because of the expectations of others, but they do not contribute to fulfilment of your goals. <i>Delegate them!</i></p>	<p>IV NOT URGENT AND NOT IMPORTANT - DISTRACTIONS</p> <p>ACTIVITIES:</p> <ul style="list-style-type: none"> ● Trivia, busy work ● Irrelevant email (spams) ● Personal phone calls ● Social media ● Unproductive meetings ● Time wasters (blindly surfing on the internet, sitting in front of TV...) ● Pleasant activities <p>These activities are distracting you from doing things that matter. <i>Forget about them!</i></p>

EXERCISE

Now, have a look at the answers of the two questions at the beginning of this session:

- Would you consider your answer – “that one thing” as urgent or important?
- Where do we need to invest our time to successfully manage ourselves and our organizations?

What results – consequences are you dealing with when spending a lot of time in each quadrant?

	U R G E N T	N O T U R G E N T
I M P O R T A N T	<p>I URGENT AND IMPORTANT - CRISES</p> <p>RESULTS:</p> <ul style="list-style-type: none"> ● Stress ● Burnout ● Crisis management ● Always putting out fires <p>By developing systems and plans in quadrant II, you can make many of the tasks in this quadrant I more efficient or you can even eliminate them.</p>	<p>II IMPORTANT BUT NOT URGENT – PLANS</p> <p>RESULTS:</p> <ul style="list-style-type: none"> ● Vision, perspective ● Balance ● Discipline ● Control ● Few crises <p>If you invest more of your time in quadrant II, you will prevent and eliminate many of the urgent activities in quadrant I and balance the demands in quadrant III.</p>
N O T I M P O R T A N T	<p>III URGENT BUT NOT IMPORTANT - INTERRUPTIONS</p> <p>RESULTS:</p> <ul style="list-style-type: none"> ● Short-term focus ● Crisis management ● See goals and plans as worthless ● Feel victimized, out of control ● Shallow or broken relationships <p>You need to renegotiate deadlines, delegate where possible, and challenge the status quo of “regular” activities that do not add value.</p>	<p>IV NOT URGENT AND NOT IMPORTANT - DISTRACTIONS</p> <p>RESULTS:</p> <ul style="list-style-type: none"> ● Total irresponsibility ● Fired from jobs ● Dependent on others or institutions for basics <p>You need to completely avoid or at least reduce spending time, efforts and resources in this quadrant.</p>

If you focus on the activities in quadrant I (urgent and important), the quadrant will get bigger and bigger on the account of other quadrants getting smaller. Usually you can find the relief from stressed quadrant I in escaping in quadrant IV (not urgent and not important). As a result, there is only little time left for the effective quadrant II.

Many people also spend their time in quadrant III, reacting to urgent things, assuming they are also important. However, usually those activities are only priorities and expectations of somebody else.

Spending most of the time in quadrants III and IV leads to irresponsible life. Effective people stay away from quadrants III and IV, because urgent or not, activities are just not important and do not contribute to your or organizational goals. Quadrant II (things that are important but not urgent) is the core of effective personal management.

To organize your time and activities well, you need to reduce necessities (Q I), manage interruptions (Q III), avoid distractions (Q IV) and most of all increase the focus on important goals (Q II).

EXERCISE

Think about your tasks and activities for a day/week at your work. Make a list and try to fill in the Matrix with them.

- What do you notice?
- What quadrant is the busiest?
- How much value are your activities having on organizational goals?
- Do you have enough time for activities that matter to you the most?

Now do the same for your personal life and answer the above questions.

4 EFFECTIVE TIME MANAGEMENT – EXPANDING THE QUADRANT II

How can you devote more time to quadrant II? You still need to pay attention to activities in quadrant I, because they are urgent and important. However, in a long run, you can reduce them by investing more time in quadrant II and make sure that with proper planning you avoid further crises. So, you can only obtain more time for quadrant II by reducing time in quadrants III and IV – as we already said, urgent or not urgent, it is just not important!

You are able to reduce time for activities in quadrant IV if you are doing these activities only as a reward for an important job well done and not as an escape from responsibilities in

quadrants I and II. You can also reduce the time spent on activities in quadrant III if you use only necessary time to finish the activity and not more. Sounds simple. However, why do so many people struggle to dedicate more time to important but not urgent activities?

4.1 Learn to say NO!

In everyday life, personally or professionally, we are ALWAYS saying “no” to something, usually many times a day. If it is not to the obvious urgent things in our lives, then it is to more fundamental, highly important things.

Quadrants I and III pressurize us, they work on us. On the other hand, to work on quadrant II, we have to be proactive; we need to work on those activities. If you want to say “yes” to important priorities, you have to learn to say “no” to other tasks, although they are urgent sometimes. You need to decide what your highest priorities are and have the courage to unapologetically say “no” to other things. You can only do that if we have a bigger “yes” burning inside.

4.2 What is really important?

It is hard to say “no” to the popularity of quadrant III or to the pleasure of escape to quadrant IV if you do not have a bigger “yes” burning inside. When you clearly define your personal/professional mission and goals, your “what am I aiming for in this life” only then you will have the right insight to make the priorities and decisions effectively. Only then you will have the true power to say “no” to the unimportant.

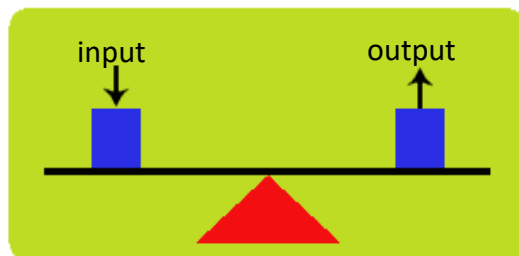
EXERCISE

- Ask yourself: “What primary goals are driving your life? What are you working towards? What is important to you?”
- Take time to reflect on your long-term goals, and examine your Matrix from previous exercise: how many tasks are not directly associated with your long-term mission and overall goals?

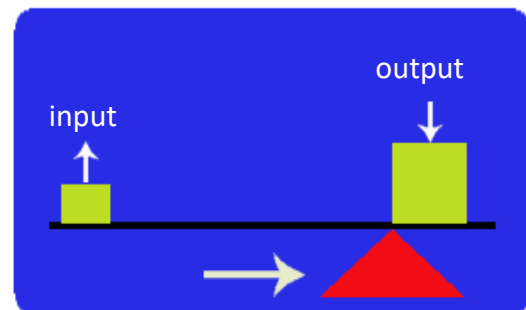
4.3 Delegate tasks!

The purpose of delegating is to transfer responsibility to other skilled people so you can focus your energy to different high-leverage activities. You need to let go of certain activities because they can take too much time and effort and other people can do a job better.

Ability to delegate to others is the key difference between the role of manager and independent producer. A producer can invest one hour of effort and produce one unit of results. On the other hand, a manager can invest one hour of effort and produce 10 or 100 units through effective delegation.



A Producer



A Manager

You can delegate in two ways:

Gofer delegation: “Do this, do that, go for this, go for that...” Gofer delegation is typical for producers and focused on methods. The person you delegate to is usually not committed to achieve results, so the one delegating becomes responsible for the results as well.

Stewardship delegation: This is a more effective way to delegate, because it is based on the free will of other people and focused on results instead of methods. People you delegate to have free will to choose the methods and become responsible for the results. This type of delegation involves clear mutual understanding and commitment about the expectations in these five areas:

- Desired result – Focus on WHAT needs to be accomplished and not how. You have to describe the result, making sure the person can visualize what the result will look like and by when it will be accomplished.

- Guidelines – Identify a clear framework within which the person should work. You make sure people do not repeat previous mistakes from others. Responsibility for results stays with them – they can do whatever is needed within the guidelines.
- Resources – Identify the human, financial, technical, or organizational resources available to the person to achieve the result.
- Accountability – Identify the standard of performance you are going to use when evaluating the results.
- Consequences – Identify what will happen (good and bad) as a result of the evaluation.

Stewardship delegation evolves the nature of our relationship. Mutual trust is built and trust is the highest form of human motivation. The steward becomes his own boss, governed by commitment and agreed results.

4.4 Be proactive!

You are proactive when you take responsibility for your life and actions and you do not look for excuses in certain circumstances or people. Being responsible (response – able) means you are able to respond to any situation. You decide for yourself what are you doing in each situation - what approach and attitude are you going to have:

REACTIVE ATTITUDE	PROACTIVE ATTITUDE
- <i>"I cannot do anything about this..."</i>	- <i>"Let me explore the options I have..."</i>
- <i>"This is just who I am..."</i>	- <i>"I can choose a different approach..."</i>
- <i>"This really made me angry..."</i>	- <i>"I can control my feelings..."</i>
- <i>"I am sure they will not let me do this..."</i>	- <i>"I can make a good presentation first..."</i>
- <i>"I must..."</i>	- <i>"I will give priority to this..."</i>
- <i>"I cannot..."</i>	- <i>"I choose..."</i>
- <i>"I wish I could..."</i>	- <i>I am going to..."</i>

EXERCISE

For a couple of days observe yourself what language you are using.

- Is your attitude proactive or reactive?
- Where do you see room for improvement?

5 ORGANIZATIONAL SKILLS AT THE WORKPLACE

The main objective of organizational skills in the workplace is to be **more productive**. Working on the principles of how to devote more time to Quadrant II (important and not urgent) will improve immensely also your overall performance at the workplace. You can see that the principles go well hand-in-hand with general recommendations on how to organize your work and be more effective in the workplace.

RECOMMENDATIONS AT THE WORKPLACE	PRINCIPLES FROM EISENHOWER MATRIX
BE PROACTIVE	When you are familiar with your personal/organizational goals, it is easier to step up to the tasks leading to those goals, although they are not pressuring you with the short deadline at the moment.
MAKE A SCHEDULE AND TO-DO LIST	When you know what tasks are important/urgent, you can make more effective schedule and to-do list to have a better overview of the tasks you need to complete.
BE AN EARLY BIRD	You can balance personal and professional life better if you have more time. Getting up early will give you extra time also to incorporate personal goals better, not focusing only on work.
MINIMIZE INTERRUPTIONS	When you learn to say no and have clear priorities, you will also be able to minimize interruptions.
LEARN TO DELEGATE	You will be able to focus on your important tasks if you delegate task that are important to others and to your co-workers.
REWARD YOURSELF REGULARLY	Reward yourself after completing an important task/achieving a set goal. you can do something fun – not important and not urgent activity.

5.1 How to improve your organization skills at the workplace

To develop strong organizational skills, you need to practice certain habits until they become a part of you.

- **Create a clean workspace** – You are able to enhance your organization skills once your desk and work area is clean. You can organize each document or item based on urgency and importance. When organizing the items, you may notice that some stored documents are no longer needed for your current projects while other objects are better suited in your home rather than on your desk.
- **Identify goals to meet and build a to-do list** – You can identify your personal and career goals you would like to meet and break them down to milestones, which you list as tasks to complete. Then you write down the steps – to do list, how you are going to complete each task and what is the deadline for each task.
- **Prioritize each task** – You organize your to-do list based on priority – you will tackle more important tasks and tasks with approaching deadlines first. If there is an abundance of tasks, you decide if any of them can be delegated to a co-worker. This will help you to better focus on completing your own specific tasks on time.
- **Input tasks into a schedule** – When your tasks are identified and listed, you can schedule when to complete each one. Based on the tasks and deadlines, the schedule can be monthly, weekly, daily and hourly.
- **Organize your materials** – You can increase your productivity and stay organized if you store documents in files that are easy to find. You can store documents in folders on your computer. The same way you can also organize your e-mail.
- **Make the most of your prime time** – Everybody has a certain time of the day when they are most productive. Some work better early in the morning, while others work best in the evening. You should schedule your most demanding work during this time.
- **Maintain a healthy work-life balance** – Successfully balancing your personal and work life can help you remain organized and consistent. You will be able to complete projects easier if you also do other non-work-related activities.

EXERCISE

Plan and organize your week ahead.

- What information do you need to make a good weekly plan/schedule?
- What is the balance between important and urgent tasks in your schedule?
- What is the balance between activities contributing to personal and those, contributing to professional goals?

5.2 How to include organizational skills to your CV

Organizational skills can include any skills that make you a more efficient and focused employee. For example:

- The ability to plan effectively
- Proper time management
- The ability to delegate assignments
- Maintaining an orderly work environment
- Knowing how to coordinate and collaborate within a team
- The ability to manage a meeting
- Being adept at following instructions
- Problem-identification and resolution
- Goal-setting
- The ability to meet deadlines
- Multitasking

EXERCISE

- Think about how your organizational skills benefited past employers.
- Review the job posting and identify keywords that are addressing organization skills.
- Think about what the employer is likely to need from you from an organizational point of view.

You can also show, not only tell about your organization skills. The way you write your CV can already demonstrate your organizational skills:

- Go for the **reverse-chronological** resume format. It brings your experience and key achievements to the front.
- Choose **simple and readable fonts**. They do not just look good but are compliant with the ATS software.
- **Write simple headings**. They will help the recruiter identify different resume sections quickly.
- Put **white space** to good use and avoid clutter on your resume.
- **Be concise**. If you can fit your resume on a single page, do it.
- Begin your resume with a **summary or career objective**.
- Then add experience and education.
- Include a **key skills section** to make sure they really stand out.

EXERCISE

Review your CV and make some improvements based on the recommendations above.

6 CONCLUSION

Personal...

The more time you spend using the Eisenhower Matrix, the more aware you will become of where your workload sits in each quadrant. The only thing you have left to do after this is to shift your time in the right direction.

You can be more effective with your time and dedicate it to more important things when you know what you aim for – what your personal/organizational goals are. You can focus on important things when you say no to not important and not urgent things in your life/organization and you learn to delegate those tasks effectively to others.

And Professional...

Organizational skills and time management are transferable personal skills. If you are a well-organized person, you will remain well-organized regardless of the job you are doing. You bring this soft skill to any position at your work and it is a highly appreciated skill for employers looking in their employees. Good organizational skills turn you into efficient and effective employees. If you have the right set of specific hard skills but are lacking organization skills, your productivity is going to plummet.

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