

THREE KEY ORDERING TOOLS

ORDERLINESS GUIDE 1

‘Success is rarely a matter of will power. It is more about setting up a good structure and systems to support action.’

MARK FORSTER

Introduction

Tim Challies (Do More Better) identifies there are three key tools to help with the ordering of our lives:

1. Scheduling tool (typically a diary).
2. Task management tool (typically a variety of lists).
3. Information tool (a place to record and retrieve information, typically a variety of filing systems).

This guide gives an overview of each tool and helps you discern your primary ordering tool.

1. Scheduling Tool



This is a diary. A basic approach to using this tool means we place time related items (typically meetings) and date related items (typically birthdays or repeating actions) in the diary.

There are broadly three types of diary:

1. **Paper** With many different potential layouts (day, week, fortnight, month per view) and designs (everything from a straightforward diary to a diary which is a part of a complete productivity system i.e. Full Focus Planner), the advantages of paper are it is often easier to get an overview of your diary, it involves writing things in which can actually help when planning our use of time, and a paper diary can be taken everywhere without requiring battery or internet connection.
2. **Electronic** With many different potential layouts and designs the advantages of electronic are that it is quicker to enter repeating items, easier to back-up, and easier to share with others.
3. **Bullet journal** Whilst a paper version, this approach is different to classic paper diaries. The advantages are that it is more visually creative, involves greater variety, and integrates well with the other tools.

2. Task Management Tool



Leaders always have a variety of tasks that need to be done, both in their working life and their personal life.

There are broadly three types of tasks:

1. **‘One-off’ tasks** They stand alone, are not part of a project. For example: buy printer cartridge, or email N recommended booklist on mentoring.
2. **Personal projects** Tasks that are related to a project, where multiple actions will need to be taken in order for the project to be completed.
3. **Shared projects** Where we are working towards a goal with other people, and tasks are shared amongst the group.

The number and complexity of our tasks/projects will influence the best approach to task management.

- **Paper** A paper approach to task management can include everything from Post-it notes to a Word document or spreadsheet.
- **App** There are a range of Apps for recording and ordering tasks.
- **Project planning tools** Again a wide variety of Apps and online programmes that can be used.

3. Information Tool



These tools are about recording and retrieving information. There is a huge amount of 'stuff' that comes our way, some of which can be immediately thrown away, but much of which needs capturing for later use. For example: sermon illustrations, minutes of meetings, information about our car insurance.

Most leaders will need a variety of storage methods, including:

- **Paper** The promise of a paperless office was made many years ago, but most of us still have some paper items we need to store.
- **Email** Whilst many emails can be deleted, some will need to be retained.
- **Computer files** A wide variety of files that we want to be able to access (including documents, photos, audio, videos).
- **Materials** Books, magazines, DVDs.
- **Information** Ideas for a future youth event, books we want to read, films we want to see, ideas for the monthly newsletter, all need storing in a way that we can quickly find and access them.

If our information tools aren't set up and functioning well we are likely to (a) struggle to find things quickly and easily (b) see a backlog of stuff building up (overflowing email inbox, books scattered across our study floor, overflowing in-tray, random bits of paper with ideas on them in multiple locations), and (c) may experience a range of negative emotions (feeling ashamed, embarrassed, out of control, anxious, frustrated, annoyed and so on).

Discerning Your Primary Ordering Tool

The scheduling and task management tools are the ones that shape our day, and are therefore slightly different to the information tool. I have read a lot of books on orderliness/productivity, and it is only recently I realised that most authors have a preferred ordering tool that they then, by default, impose on their readers as the most effective way to approach how to organise yourself. But there is no one way to do this. The key is to find a way that works for you, and master it.

So, it helps to discern whether a scheduling or task management approach is your primary way of ordering what to do on a day-to-day basis. We all use a combination of both, but one is more likely to shape how we determine what we do than the other on any given day/week.

SCHEDULING APPROACH

Those who use a scheduling tool (a diary) as their primary ordering tool tend to put most things in their diary, not just time specific things (i.e. meetings) or day specific things (i.e. someone's birthday), but also time to prepare things, time to work on a specific project, time for admin, time to think or read and so on. Consequently their diaries tend to look pretty full and very structured. People who enjoy this approach tend not to worry too much about feeling restricted by their days being mapped out. In fact they find it a relief that they don't have to wake up each day and work out what to do. (They may also tend to be more able to focus on whatever task is at hand and less affected by their mood as to what they feel like doing).

TASK MANAGEMENT APPROACH

Those who use a task management tool as their primary ordering tool tend to put most things on a variety of lists. Their diaries tend to contain mainly time and day specific things and little else. These people like to wake up in the morning with a sense of freedom about what they are going to do that day (outside of course the scheduled items in their diary that are meetings). They tend to decide what to do based on a variety of factors (including priorities, mood, energy, intuition, and feel).

Both types of people can be highly effective in getting stuff done, they just approach it in different ways. And both types of people will need to use both ordering tools, they just tend to use them in different ways.

HOW TO DISCERN

The following may help you work out which is your preferred ordering tool.

- Take a guess, which do you instinctively think is your primary ordering tool, diary or lists?
- Look at your current method of deciding what to do each day (outside of meetings). Do you tend to turn to your diary or to your lists?
- Do you prefer to wake up knowing pretty much exactly what you are going to do and when, or do you prefer to wake up with lots of options for your day and are happy to decide that day?
- Which do you 'enjoy' using more, diary or lists?

As mentioned above, people in complex roles will find themselves needing to use both tools, so it is a matter of identifying which is primary and which is secondary. In this series we have written a further guide for each of the tools.

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GETTING FOCUSED ON WORK

ORDERLINESS GUIDE 2

Introduction

How we use our time, energy and attention is a vital factor in how we work. The combination of these factors affects our ability to focus, and knowing our rhythms or patterns through a day, week, month, term, or year can help us decide what work to do when.

In his book *Productivity Ninja*, Graham Allcott outlines three levels of attention:

1. **Proactive** When you have most energy and focus, are at your most creative, able to tackle the most complex tasks.
2. **Active** Medium levels of energy and focus, more easily distracted.
3. **Inactive** still part of your working day, but not able to tackle complex things, energy is limited.

I actually think it is more than just attention that we need into take account when discerning what work to do when, and like to describe the combination of elements as a formula.

$$F = E \times T \times (A - (D + I))$$

Where F= Focus, T=Time, E=Energy, A=Attention, D=Distraction and I=Interruption.

Focus is needed for what Cal Newport calls 'deep work'; work that demands the most of us, work that requires we engage with every part of our being to think hard about something, move something on, prepare something. But not all work requires such levels of focus, as Allcott outlines with his proactive through to inactive attention levels.

Let's break down the various components of focus.

Energy

Each of us has an energy flow through the day, it is called our chronotype. I am a morning person, my energy levels

are highest in the morning. So, this is the best time for me to do talk preparation, strategic thinking, preparation for a tricky meeting. I take a significant slump in my energy post lunch, recover a bit by 2.30pm through to around 6pm, and then take a long slow decline through to around 10pm when I go into screen saver mode, and 10.15 when I enter power off mode.



Others are exactly the opposite to me. They are at their most energetic in the evening, often through to quite late at night. Mornings are their worst time of the day.

Life is generally geared for morning people not evening people. Schools start at 9am and finish by 4pm, most work places follow a similar pattern through to around 5pm. So if you are an evening person you can be at somewhat of a disadvantage. However, most church workers have a surprising amount of freedom with how they order their time, and knowing our energy flow can help us identify what to do when. For example, when I worked in a church I went for a run around midday, had lunch and then a 20 minutes snooze. This re-energised me for the afternoon and helped me through my least productive part of the day.

Of course other factors significantly affect our energy: exercise, types of food we eat, drinking enough water, quality and length of sleep, rest and relaxation, alignment of our strengths, gifts and passions with our work. (See Rangan Chatterjee's *Four Pillar Plan* for an excellent guide to these things).

Time

You can't give focus to something if you don't have the time to do so. Sounds obvious I know, but without time in the diary to do deep work it simply won't happen. Deep work is normally important but not urgent, so it easily gets squeezed out by more pressing urgent things. Part of the skill of ordering life well is to ensure there is time in the diary for deep work, protected time.

If you identify an 'ideal week' (see the Guide on Scheduling) you can identify those times in the week to block out for this sort of work. For me that means blocking out mornings for the tasks that require my best energy levels.

Attention, Distraction and Interruptions

In our hyper-connected world, based on a distraction economy, attention is increasingly becoming a lost art. It is hard to be fully present if we are continually distracted by the things around us. But without attention it is hard to focus, to do deep work. Research shows that each time our attention is drawn away from the task in hand it can take up to 23 minutes to fully re-engage with the original task.

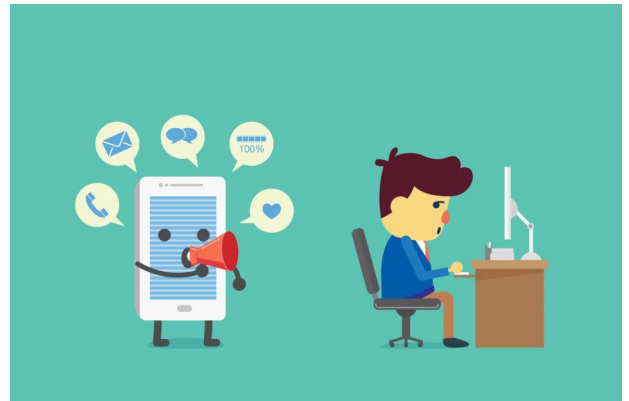
To be fully attentive, fully present, we need to deal with distractions (those things from within us that tempt us away from focused work) and handle interruptions (those things from outside ourselves that lead us away from focused work).

GET RID OF DISTRACTIONS

There are a variety of things we can do help get rid of distractions.

- **Find a quiet space to work** Many offices are open plan, and therefore very difficult to do focused work in because of all the distractions going on around us. Finding a quiet space to work, or putting on some headphones to limit the distractions around us may help. Even those who work in their own study/office can still be distracted. Some have separate work areas for different types of work, and their place for focused work is clear of distractions. When they go to that space their body develops a sort of mental muscle memory that associates that space with deep work.
- **Leave your phone away from your deep work space** Our phones are designed to distract us, to draw us into their wonderfully enticing Apps and programmes. Everything from the colour of the buttons to the seductive placing of the ads is designed to keep us clicking and scrolling for more. So, don't have them around when you want to do deep work. Remove the temptation. And if you can't do that...
- **Turn off notifications** We can do this temporarily by selecting either the do not disturb function on our phone that turns everything off for a set period of time, or by shutting down programmes we don't need open on our computers. (Ultimately it is a good idea to go cold turkey on notifications. Turn them all off and don't have any of them on for a week. Then review what you have missed and those you really need on and only turn those ones back on.) Or...
- **Use an App like Focus or Forest** When you start Forest it begins to build a forest on your phone. If you pick up your phone the forest is cut down. You determine the

length of time your forest has to grow, and if you reach a certain number of trees on the App a real tree is planted.



- **Pause your inbox** If, like me, when you are doing deep work you may need to access your emails for some information but then are distracted by those enticing new emails that have landed in your inbox, use a programme like Boomerang which allows you to 'pause' your inbox for a pre-determined amount of time. When the time is complete, all your emails will appear in your inbox.
- **Limit access to websites** Again, you may need access to websites as part of your deep work, but the temptation to be distracted by Facebook or BBC news or whatever is your favourite website can be strong. There are various programmes that enable you to lock yourself out of specific websites ([Freedom](#) seems to be a popular one and works across platforms). [Here](#) is more on how to block these sorts of distractions.
- **Clear clutter** Stuff can be a distraction, not just technology. Our workspace will either help or hinder our ability to keep attentive to the task in hand. There is no one way of doing this, but spend some time on thinking through what would be the most helpful way of designing your workspace for maximum attention, everything from the position of your desk, to the comfort of your chair, to what is or isn't around you.

BE WISE ABOUT INTERRUPTIONS

Church leaders work in a role where interruptions often provide wonderful opportunities for serving or blessing another person. I remember at theological college being told 'interruptions are your ministry', and whilst I don't fully go along with that sentiment, I certainly understand it. For that reason conventional wisdom on dealing with interruptions doesn't work so well for those in church roles.

Matt Perman suggests it is best not to aim to minimise interruptions, but rather avoid or embrace them.

- **Avoid** There are times when we need to do focused work and it is best to avoid interruptions completely.



Normally this simply involves going to a place where we can be on our own and ensuring those things that can interrupt are placed to one side, which for most of us means the phone. If we work in an open plan office or a more accessible space, then we may need to agree some protocols around when we don't want to be interrupted. This can be as simple as moving to a particular space where we have already let people know we don't want interrupting, or it may be indicating that we are about to do some uninterrupted work, and before we start ask if there is anything we can help with. Agreeing how to indicate we are in 'no interruption' work mode and under what circumstances, if any, we can be interrupted is a relatively simple way of protecting our attention.

- **Embrace** The rest of time we can extract value from interruptions by seeing them as an opportunity to serve and bless others. Normally people interrupt because they want something from us, and it is great to be able to lay aside what we are doing in order to lovingly serve someone else, without resentment or frustration. The more we practise the avoiding of interruptions for focused work, the more we will be able to embrace interruptions well the rest of the time.

Focused Work

Focused work, deep work, requires our time, energy and attention to be aligned. We can't sustain this deep work all day every day, and that is why Allcott's chart (see below) which suggests different types of work require different levels of focus is so helpful. We can plan our day around these types of work and create a rhythm for our day.

One other factor that can help with this is knowing whether we are introverts or extroverts (used technically to describe whether we draw our energy from being with

people or from being on our own). As an extrovert I ideally plan my meetings with people in my mid-energy level part of the day, as being with people brings me energy, whereas an introvert may find that they need a higher level of energy for meetings, because being with people tends to drain them somewhat. This does depend on what type of meeting it is, but it can be helpful to reflect on where we gain energy and how this might influence our daily rhythm.

Another thing to be aware of is that some people find significant time spent at a screen draining. If you are one of these people, try to mix up screen time with other media to help you with focused work (paper, white boards, post-it notes, drawing/painting). Also be sure to have your screen set at the right height, without bright light behind it, and that you have an annual check up for your eyes.

Here are some other tips to help us focus on a tough piece of work:

- **Play some music** Some people hate this, they need quiet for work, but others find music actually helps them focus better. Generally music without words is best, and [Focus at Will](#) and [Brain FM](#) have created playlists you can use according to what sort of work you are doing (you can also find playlists on Spotify and YouTube; for more on the science behind this see this [article](#)).
- **Choose a different environment** Some like to go to a coffee shop to focus on deep work, or work in a park. Find a place that works for you and regularly go there when needing to focus.
- **Break your work down into small chunks** The [Pomodoro](#) technique is very popular for doing this. It suggests 25 minutes of focused work and then taking a five minute break.

PROACTIVE ATTENTION	ACTIVE ATTENTION	INACTIVE ATTENTION
Key decisions	Day-to-day decisions	Filing
Project planning and reviews	Scheduling the day's work or keeping on top of action lists	Ordering stationery or other online purchases
Important phone calls	Internet research	Printing stuff out
Critical emails	Most email processing	Deleting emails or throwing away paperwork no longer needed
Chairing meetings	Attending meetings	Attending meetings that we don't care about but can't otherwise avoid
Creative thinking, writing, sermon prep, etc.	Preparing rotas, handouts etc., making sure got everything need	Making coffee!

- **Go for a walk** Many people find that walking when pondering something challenging provides them with a different perspective. It seems to be the combination of being out in nature (something that many find energising, enlivening), the rhythm of walking, and the fresh air to wake up the brain.

Identifying Rhythms

Just as we have thought about what our daily rhythm might look like it may help to reflect on other rhythms.

WEEKLY

Our energy level will flow through a week as well. I am generally fresher at the start of a week after a day of rest than at the end of the week, so my most challenging work is best done in the early part of the week. I've also thought about the number of delivery events I can sensibly sustain through a week, and how many evening meetings and so on. All this helps me to develop a sense of the (almost) ideal or basic week.

MONTHLY

I find that taking two days of rest once a month is enormously helpful in maintaining my energy levels over a longer period of time. I know some people plan a day a month for reading, or for thinking. Others have a monthly quiet/prayer day.



TERMLY

I tend to work pretty hard, and can do that for around eight weeks or so before needing a longer break. Partly due to having school age kids for so many years I have found the pattern of half term and end of term breaks has worked well for me through the year. I don't have enough holiday allowance to do that every term, but I find in the summer term I am more energised (see below), so don't take the summer half term off, but do deliberately try and slow the pace through that week.

I plan some thinking days each term when I block off several days set aside to think about something in depth. I don't always know what I am going to think about when I put the days in my diary, but I can always find something by the time the days come round.

YEARLY

I am solar powered. I love the sun and warmth. Consequently I find the winter months quite difficult. Knowing this, I plan my most creative projects for the summer period when my energy is high.

I also follow a pattern of six-weekly quiet days through the year that provide me with space to pray in a more

spacious way. Others plan a retreat once a year. Some plan a reading week once a year where they go away with a pile of books they have accrued through the year and immerse themselves in a particular topic or range of topics.

Why Bother?

Think back over the last few years. What new ideas, products, events, processes, results have excited you when they have taken off? What dream has been realised that you thought may never happen?

Alternatively, think back on ideas that haven't come to fruition, dreams that have evaporated amidst all the busyness of life.

There is a good likelihood that the former are things we focused on, and the latter aren't. Focused attention, energy and time tends to lead to things happening. One of the most important things a leader does is think about things. Thinking helps us with idea generation, problem solving and creative engagement. And thinking requires focus.

It was Alexander Graham Bell who said 'Concentrate all your thoughts upon the work at hand. The sun's rays do not burn until brought to a focus.'

Resources

- An [article](#) on getting rid of distractions.
- Deep Work, Cal Newport (Piatkus)
- How to be a Productivity Ninja, Graham Allcott (Icon Books)

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MANAGING ALL THOSE TASKS

ORDERLINESS GUIDE 3

Introduction

There are three key tools to ordering our lives:

1. Scheduling tool (typically a diary).
2. Task management tool (typically a variety of lists).
3. Information tool (a place to record and retrieve information, typically a variety of 'filing' systems).

Guide 1 gives an overview of these 'Ordering Tools'. If you haven't yet read this, please do. This guide focuses on how to set up a system for managing tasks.

'To a large degree, your productivity depends on identifying and using the best tools for the job and then growing in your skill in deploying them.'

TIM CHALLIES

Principles for Task Management

- There is no one way of doing this: the key is to find a way that works for you, and master it.
- Make sure that whatever system you use for capturing things that need to be done can be with you at all times, so you can quickly and easily record things as they occur.
- Those who use task management as their primary ordering tool are likely to use a variety of lists. Don't mix different types of items on one type of list. Try to ensure that each item is on the right list, otherwise a list can become very confusing.
- Try to find a way of making lists that is attractive for you. I chose my App on this basis over against other possibilities. I liked the font, layout and colour scheme as well as the functionality. This means it has 'drawing power'. I like using it.

PCC meeting checklist. Time spent working out all the different things you need to do for any repeated event is time well spent, especially if it is novel to you. (For a fascinating read on checklists see Atul Gawande, The Checklist Manifesto.)

'Checklists help produce the clarity that produces momentum and checklists reduce the uncertainty that causes friction.'

GRAHAM ALLCOTT

Basic Lists

There are two types of lists that serve everyone well. Those who use their diary as their primary ordering tool may only need these two basic lists (although this will depend on the complexity of their role).

- **Check list** This is the most basic list. Create a check list for anything that you do regularly, contains multiple elements, and requires an eye for detail. For example: funeral checklist; youth weekend checklist; planning a



- **Daily to do list** This list will guide you in your tasks for the day alongside the things that are already in your diary. It doesn't have to be very complicated (a post it note may well be sufficient). See Guide 8 on Top Tips for Daily To Do Lists for more on this.

A Task Management Structure

If task management is your primary ordering tool, or your role has a significant degree of complexity, your task management is likely to need several layers to it. There are multiple ways of constructing a system, and most productivity writers have a particular way of suggesting we do this. As always, the key is to find a system that works for you and master it.

As a basic structure, there are likely to be five components, the first three are best stored in your task management tool(s), the last two in your information tool:

1. **Project list** A way of recording all the projects that you are working on, in every aspect of your life.
2. **Task list** A way of capturing the actions that need to be taken to both deliver on your projects and actions that are one-off tasks.
3. **Daily to do list** A way of identifying the things that you are going to do today alongside the items in your diary.
4. **Ideas list** A way of capturing ideas that you don't want to forget but don't involve an action at this time.
5. **Waiting for list** A way of recording that you are waiting for someone else to do something before you can determine or take your next action.

All these components are lists, and that is why it can be a bit confusing. If we're not careful we either place items on the wrong list, or we store the lists in the wrong place. These five lists differ in both type and where they are best stored. For more on each see below.

1. Project List

A project can be defined in a number of ways. A common definition is any task that requires two or more steps to complete. However, this may not be the most helpful definition as it would mean on your projects list you will have significant large pieces of work alongside relatively small and simple pieces of work. For example, build an extension on the house may sit next to replace ink cartridge (which technically requires two steps to complete i.e. buy cartridge, put cartridge in the printer). Perhaps a better definition for project is 'any significant initiative (complex and important) that produces a particular result and has an end point'.



Here are a few tips for creating your projects list:

- Identify a small number of categories for your projects. For example: personal, work, family, church, home, social. This helps when reviewing projects to be able to consider ones in a particular category.
- Try to name a project in a way that reflects a measure of what a successful outcome might be. For example: Messy Church might be 'Messy Church with 12 new families attending.' This helps give clarity about the focus, the why of the project.
- Be careful not to add 'information' to your projects list unless they can be stored as linked files – information is best stored in your information tool.

2. Task List

This is a list of actions that need to be taken. There are broadly two types of tasks:

- Those related to projects that will progress the project towards completion.
- Those that are 'one-off' tasks, that stand alone from a project. For example: buy printer cartridge, or email N recommended booklist on mentoring.

1. PROJECT RELATED TASKS

Each project will have a list of actions that need to be done to complete the project. More complex projects may have 'subprojects' that need to be completed to get the overall project done. Where you record these tasks will depend on the system you chose.

Some systems enable you to store the tasks with the project. For example in the [Todoist App](#) you can structure it so that there are categories, then projects within the categories, and then tasks to complete the project within the project folder (even subdividing these into subsets if you want).

Others chose to have a project list and alongside it a 'master actions list' that comprises of all the actions needed to complete all the projects. The actions might be listed under context, time, energy or priority (or a combination of these) to give you an indication of where they need to be done, how long they might take, how much energy they require, and how important they are.

2. ONE-OFF TASKS

These are the sort of things that may arise during a meeting as an action point from that meeting, or come to mind when we are praying, driving the car, walking down the street, in the shower, or having lunch. We don't want to (or can't!) do them there and then, but we do want to record them because they need to be done.

Critical to the capturing of these tasks is having a system we use that is always with us, can be quickly accessed, and



then can be easily reviewed as part of our weekly/daily review.

For many years I always carried a small pad of post-it notes and a pen with me wherever I went (in fact I had multiple post-it pads and pens located in all the different places I was likely to need them – jacket/coat pockets, car, desk, bags and so on). Whenever anything occurred that was a task to be done, I wrote it on a post-it note there and then. More recently I have started using the Todoist App to capture these things. It has the advantage of being accessible on all platforms, and tasks can be entered by writing or voice.

TIPS FOR ADDING YOUR TASKS

Some people like to have a single task list combining both project related tasks and one-off tasks. Others like to have two separate lists, one related to projects, and one for one-offs.



When adding items to your task list ensure you write them as an action, not information. Each action ideally describes exactly what you need to do. Clarity here makes a big difference, as it ensures you know exactly what has to be done when you look at your to do list. Two things can help gain this level of clarity.

- Use the structure of verb, subject, object.
- Try to picture yourself doing the action, something physical that involves an action. For example 'follow up N about the report.' becomes 'Call: N to finalise report.'

For some it may help to nuance your list by either placing them in distinct categories (as described above, context, time, energy, priority), or by placing these things at the end of the task:

- **The energy level required to do the action** Through the day our energy fluctuates from high to low and this impacts our ability to focus. Simply writing next to the item on our to do list whether it is a high (H), medium (M) or low (L) energy task can guide us as to when is the best time to do that task in the day.
- **The time you think it will take to do it** Some items on the list may be very quick (5 minutes), others may take substantial amounts of time (60 minutes).
- **The importance of the task** It may help to grade the importance, either using a scale (for example 1-5) or a colour scheme (this can often be done in Apps using a priority grading system).
- **The drain level of the task** Some tasks energise us, some drain us, so you can also add another letter to indicate the impact of doing the task on you: E for Energise, N for Neutral and D for Drain. This enables you to place draining tasks in between energising tasks.

For example 'H/30/1/E' might indicate high energy level for a task taking 30 minutes, which is high priority and brings you energy. This can help you work out what to do when i.e. if you have 30 minutes available when your energy level is medium you can look at your list and decide to do two 15 minute tasks (ideally of a similar type) requiring medium energy level.

TIPS FOR MANAGING YOUR TASKS

At some point each day (preferably at the same time each day) process all your new tasks. Whether you are using a paper or electronic format for capturing the tasks, consider each one and decide to:

- **Delete** If it actually doesn't need to be done.
- **Do** If it can be done in a few minutes, do it as it may take longer to process it into your task management system that actually doing it.
- **Delegate** Pass it on to someone else who needs to do it.
- **Defer** Place it into your task management system (or diary) so that when you do your weekly/daily review it will be there to remind you of what needs to be done.

Using a task management approach to ordering our lives will require a regular check in with our lists. This is normally done on a weekly and daily basis.

- **Weekly review** You will need to look at your project list and task list to plan your work for the week, taking into account (a) how much space you have given your diary commitments for that week and (b) your larger goals for that season of time you are in (these are discerned through a wider process).
- **Daily review** This enables you to plan what you are going to do today. It doesn't take long, but does ensure you are (a) clear about your actions for the day ahead, (b) identify when is the best time to do them (according to complexity of task, personal resistance to doing it, and the level of focus you need to do it), and (c) how they will fit in with existing diary commitments for that day.

See Guides 6 and 7 for ideas on how to construct a weekly and daily review.

'No approach to organising your lists will work if you do not regularly review those lists.'

MATT PERMAN



3. Daily To Do List

Your daily to do list helps shape how you use your day. We've written a separate guide on Top Tips for Daily To Do Lists.

4. Ideas List

These lists capture thoughts you have about things but aren't necessarily going to action. They don't go into your task management system but into your information system, where you can quickly locate them and retrieve the information when you want it. For example, birthday present list for spouse; Items to purchase when in town; home improvement ideas; things to talk with a colleague about.

5. Waiting for List

This is a list where you record all the actions you are waiting for others to complete, which when done will enable you to progress your next action. Again, this is a list that is kept in your information system (Evernote or Oenote are both good for this).

Master Your Task Management

Ultimately it will be for you to design a process of managing your tasks that works well for you, and then master it. Taking time to do this is time well spent, and then perhaps once a year review it in the light of experience and new insights and ideas you may have gained from elsewhere to improve it.

SUGGESTED APPS

Todoist Across platform task management App. Can create category, project, task, subsets within tasks. Can sort by date, by priority. Can't add notes in free version. Excellent App for complex list handling.

Swipes Multi platform and web based task management App. No categories, can date, assign a label, add notes. Great for simple to do list.

Asana Ideal for cross team project planning. Multi-platform. Can assign tasks to others, add notes, create sub sets in projects.

JAMES LAWRENCE
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USING A DIARY WELL

ORDERLINESS GUIDE 4

'Lack of white space in the calendar corresponds to the lack of white space in one's brain.'

MATT PERMAN

Introduction

There are three key tools to ordering our lives:

1. Scheduling tool (typically a diary).
2. Task management tool (typically a variety of lists).
3. Information tool (a place to record and retrieve information, typically a variety of 'filing' systems).

Guide 1 gives an overview of these 'Ordering Tools'. If you haven't yet read this, please do. This guide focuses on how to use a diary well.

Principles for Scheduling

- There is no one way of doing this: the key is to find a way that works for you, and master it.
- Have one diary for all of your life. Trying to separate a work diary from a personal diary generally doesn't work as well.
- All time and date related items need to be recorded in your diary.
- Those who use scheduling as their primary ordering tool are also likely to include a wide variety of other items in their diary, but it helps to work to the 70% principle i.e. don't overschedule your time, around 70% of a day scheduled is an ideal maximum. This leaves space for things taking longer than we thought, the unexpected, and the spontaneous.
- Try to find a type of diary that is attractive for you and works for you. Broadly speaking there are three alternatives (a) Paper (b) Electronic (c) Bullet journal (a variation of paper where you create your own format and design).

A Basic Diary

Those who use task management as their primary ordering tool are likely to use their diaries for two types of entries:

- **Time related items** A good example of this is meetings, which includes not only meetings of groups that we might belong to, but also one-to-one meetings, including ones with those closest to us. It is important to record these meetings in our diary, otherwise a

commitment in our head to spend Tuesday night with a friend or spouse will easily be lost when someone asks us to do something on Tuesday night and there is nothing in our diary to tell us we are already committed that evening. Also included here may be regular meetings with yourself, for example exercise, your weekly review, prayer time.

- **Date related items** Birthdays, holidays, rest days, quiet days all fit into this category. There is an advantage to an electronic diary at this point, as repeating events can easily be entered.

A More Detailed Diary

Those who use their diary as their primary ordering tool are likely to have a more detailed approach to their diary. Typically they tend to plan out their days in some detail, and don't mind waking up in the morning knowing their diary will tell them what to do that day.

Here some guidelines on using a diary in that way, which recognises the realities of a leadership role.

PLAN KNOWING YOUR FOCUS FLOW

See our guide on focused work, which helps you to identify your daily, weekly, monthly, termly and annual rhythms. Working with these rhythms enables us to do the right sort of work at the right time in the day.

PLAN USING AN IDEAL WEEK

Overviewing what an ideal week looks like is particularly

helpful for those who use a diary as their primary ordering tool, but others will benefit from it as well. It involves plotting what an ideal or basic week (or as I like to call it an 'almost' ideal week) might look like. There is a template you can use at freetofocusbook.com/tools.

It helps to identify if there are particular things best done on particular days within the week, as well as specific things to do at specific times of each day. It gives 'shape' to a week and aids a sense of flow, as well as enabling us to ensure that priorities are given the time and energy they need.

PLAN FOR ADMIN

The Church of England Experience of Ministry Survey identifies that the average stipendiary incumbent spends between 8-11 hours on admin a week (including emails). If this time isn't in the diary it will get squashed out by other things and then it will eat into our down time to get this sort of stuff done. So, admin needs to be in our diaries, and if the survey is accurate it will be around 1.5 hours a day.

Generally speaking it is best to batch similar tasks, so ideally admin is put in the diary in a block. Many find that two blocks, not one, works well, the first being the main chunk of admin a day, the second a shorter chunk to catch up with processing emails and other smaller admin tasks. It also helps to identify a time when your energy and attention are not at their best. These times should be reserved for deep work which requires the very best of our focus. Admin is ideally done in those times of the day when our energy is at a mid level.

PLAN FOR INTERRUPTIONS

In this instance I want to focus on the predictable things that are going to happen, but you don't know when (see our guide on working to your rhythms for an exploration of other types of interruptions).

'The appointment calendar is the tool with which to get unbusy. It's a gift of the Holy Ghost (unlisted by St. Paul, but a gift nonetheless) that provides the pastor with the means to get time and acquire leisure for praying, preaching, and listening... The trick, of course, is to get to the calendar before anyone else does.'

EUGENE PETERSON

The classic example for clergy is funerals. We can identify on average how many funerals we have a month, even a week. Let's say that on average we have one a week. We also know approximately how much time an average funeral takes, not simply in the conducting of the funeral, but in the visits, preparation and admin that surround a funeral. So, if we say that amounts to four hours work for an average funeral, then putting that amount of time in our diary each week is planning for that interruption.

Of course if you put this time in on a Wednesday afternoon it is unlikely the funeral will fall into that space, but rather like the Christmas cracker toy, the space means we can move other things around to accommodate when the funeral does come up. What we were planning to do on Tuesday afternoon can be moved to Wednesday.

1		3	4
6	2	11	10
5	8	7	9
14	12	15	13

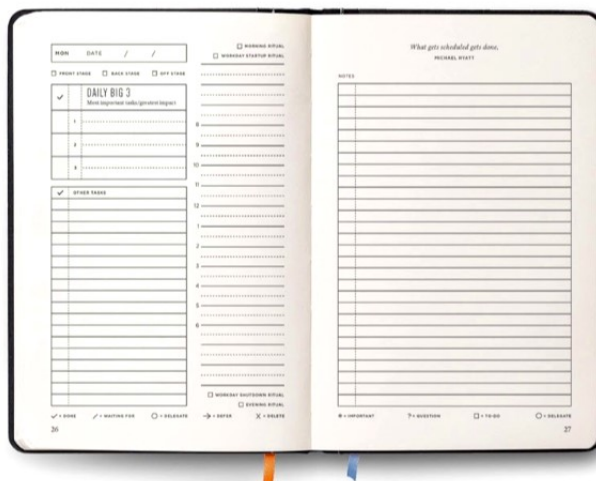
The guideline to make this approach work is that you can't put anything in this space until that week.

PLAN FOR MEETINGS

Church leaders have a huge number of meetings, and our role is to try and make these meetings the best that people attend. But it is very easy to go from one meeting to the next without any time to adequately prepare for them, or to follow up the action points from each meeting.

Those who focus on good meetings tell us that a meeting of substance will require more time preparing for the meeting and actioning it afterwards than time in the meeting itself. And herein lies the problem for many of us when it comes to meetings in our diary; we only put in the meeting time and not the preparation or action time.

The best time to action a meeting is as soon after the meeting as possible when things are fresh in our minds. The longer we leave it between the meeting and actioning things from the meeting the harder it is to connect with



what we need to do and therefore for the more energy and time it takes.

So ideally, for each meeting put in the meeting and preparation time and action time as well.

PLAN FOR GETTING BEHIND

The reality is that most of us do get behind. Things don't work as we planned or hope; wonderful opportunities to serve others arise that we couldn't have predicted, things just take longer than we expected. So we get behind. But if this is a normal reality we can plan for it.

For many years I put a CUD day in my diary, a Catch Up Day. It was a whole day once a month, because that was on average what I needed to catch up with everything I had got behind with. It was so freeing knowing I had a regular buffer day to absorb stuff I hadn't yet done. These days need to go well in advance (I tend to put them in a year in advance). As with all 'big stones' the guideline is that we can rearrange them but we can't cancel them. They are in the diary for a reason!

PLAN FOR TIME TO PRAY, THINK, READ

There are three things that quickly disappear from a busy leader's life: time to pray, think and read. All are vital to the health, well-being and effectiveness of a church leader.

If the diary is our primary ordering tool, then these things need to be in the diary, or at the very least a part of our morning/evening routine. My prayer time each day isn't in my diary because it is a part of my morning routine that rarely varies and happens before I start work. I have a quiet day every six weeks that is in my diary, and I plan these a year ahead, otherwise they would never happen.

My reading time is in my diary as it happens within work time and I want people to see it blocked out, as is my time to think. I tend to have reading time each day as I know how vital this is to me starting a day well, and I have thinking time in blocks of several days once a term. I may also think and read outside these times, but the allocated



time helps me to protect these three vital aspects of my role.

PLAN KNOWING THERE IS NOT ENOUGH TIME IN ONE DAY TO DO EVERYTHING

Many of us have long lists of things we want to do, and when we look at our diary for a day struggle to work out how to fit them all in. However, planning a week at a time (see our Guide on the weekly review) is a way to absorb a wide range of things into our diaries and relieve the pressure on a single day.

Tips for Diary Entries

There are lots of practical ways to improve our diary entries. Here are a few tips, some of which will only work for electronic diaries:

- **Include relevant material in the entry** If I have put 'responding to a difficult email' in my diary I copy the email into the entry and then all the information I need to complete the action is there waiting for me. Or if responding to a report, copy the report into the entry.
- **Use alerts/alarms** I put a reminder on time related items that I want to make sure I don't miss or am ready for. I set the reminder according to how much time I need to be ready for the activity. For example, if I have a chiropractor appointment in town, it is a 45 minutes drive/walk to get there, so the alert goes in 55 minutes before, giving me time to get ready to leave.
- **Use colours** Some people find it helpful to use colours for similar types of entries. For example, my admin blocks are in one colour, holidays in another, birthdays in another.
- **Use designations** Most electronic diaries allow you to designate an entry as 'busy' or 'tentative' or 'working elsewhere'. These help you know (and others who may have access to your diary) what sort of entry it is.
- **Use privacy settings for personal entries** If we are using one diary for all of life, the privacy setting allows us to put things in our diary without others knowing what the entry is.
- **Don't include everything in your diary** Tasks are for your task management tool, unless you are entering some time to actually do a significant task. Notes and information are for your information tool. By keeping these things in their appropriate place you will prevent your diary from becoming overly cluttered.

Further Ideas

- Tips on how to use Google calendar [here](#).
- Tips for how to use [Microsoft Outlook](#) calendar.
- 20 calendar management tips [here](#).
- A review of [popular paper planners](#).

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HOW TO STORE INFORMATION

ORDERLINESS GUIDE 5

'The information tool functions as your auxiliary brain.'

TIM CHALLIES

Introduction

There are three key tools to ordering our lives:

1. Scheduling tool (typically a diary).
2. Task management tool (typically a variety of lists).
3. Information tool (a place to record and retrieve information, typically a variety of 'filing' systems).

Guide 1 gives an overview of these 'Ordering Tools'. If you haven't yet read this, please do. This guide focuses on how to set up and use your information tool.

Principles for Capturing Information

- There is no one way of doing this: the key is to find a way that works for you, and master it.
- Most leaders will need a variety of information tools, some physical and some electronic.
- Store like with like.
- There are three parts to a good information system: (1) collect (2) manage (3) access. All three parts need to work. For example, if you collect information but can't easily access what you need six months later it isn't a functioning system.
- Try to find storage methods that are attractive and work for you. You are more likely to use them if you actually like the way they work.

What Will You Need to Store?

Storing information is nothing new. My mother used to keep an address book near the telephone. It contained all the relevant information she needed to contact her friends and family. Most of us now do this on our phone in something called 'Contacts'.

For those in church leadership there are a range of categories of information that most of us use. Where there is some overlap between these categories, it helps to decide where we are going to locate things so we are consistent over time.

- **Data** For example, contacts, church membership roll, credit card/bank statements, Gift Aid returns, DBS

checks. This is information that is often retained in a spreadsheet or App, or, if paper, in a file.

- **Ideas** For example, a list of possible presents for loved ones, ideas for a future project, potential summer holiday destinations.
- **Articles** For example, things we read in a journal or magazine or a blog post online. They may not be relevant now, but we want to store them for reference in the future.
- **Documents** For example, agendas, notes or minutes for meetings, policy papers, registers, project related documents we are working on, notes on books we have read.
- **Illustrations and quotes** For those of us who speak or write collecting useful illustrations and quotations is helpful. These may also includes videos and images.
- **Photos and videos** This is a rapidly expanding area in our smart phone world. Most of us don't have much trouble collecting videos and photos, but we may have some difficulties with managing and accessing them. There may also be videos we use for our work, for example countdowns for services.

Stage 1: Collecting Stuff

The basic principle here is to have two collection points, one electronic, one paper, into which things are immediately placed when they come in. So, a bank statement arrives in the post, it goes straight into your paper collection point (often an in-tray or equivalent). You

have an idea for a talk you're giving in a few weeks time, you write it down either on a post it note or equivalent, and then put it in your in-tray as soon as you can, or capture it in your electronic 'inbox'.

Some things bypass this process because they can be put straight into their storage place. For example, someone wants to give you their contact details. Most of us would put this straight into our phone, which also has the benefit of automatically guiding you through the information to be stored and then orders it alphabetically in your contacts. Our phone App makes managing and accessing the information easy. Other things are automatically stored in their place, for example photos taken on your phone are automatically stored in your Photo App.

At the end of a week we have collected a range of items, some in our paper collection system, some in our electronic collection system. And if that is where they stay, then problems will occur. The collection places will get full, and it will be almost impossible to efficiently access the information we need, especially as time passes. This is why the second part of the process is vital.

Stage 2: Managing your Information

The items in our collections points (electronic and paper) now need managing/processing. Some people do this as part of their daily admin routine, others do it on a weekly basis. At the very least it needs to be done on a monthly basis so that things don't build up.

PAPER

The process is simple: take each item and either throw it away because you now realise you don't need to keep it, or move it to the relevant storage place. See also Guide 9 on Filing. Here are a few examples.

- **Credit card/bank statements** Those received on paper can be placed in a file. It works best to store them in date order, and many people prefer having the latest one on top. The key is to take a consistent approach across all similar files. Also, when adding a statement, take one out of the bottom of the file and shred it (generally financial details need keeping for five years). This means we are prompted to 'manage' our system each time we use it.
- **Ideas** Create a project file for each project you're working on, and place the idea in that file. Or if it is an idea for a future project, write it down on a list of possible projects.
- **Agendas** for a meeting go in the file related to that meeting so that we have all the relevant information for the meeting in one place. If it is a regular meeting, it may be worth creating a ring binder file for that meeting. When clearly labelled, keep it on a shelf with all our other meeting files. Such files make it easy to access not only the paperwork for the next meeting but also past meetings. After the meeting you can then add any paperwork from the meeting to the file, and later the minutes when they arrive.
- **Illustrations and quotes** In the past many people collected these on cards and had an indexing system. Today this is generally more easily done electronically. Programmes like Onenote and Evernote allow you to record the quotation, and then add a tag so that you can easily search for it. The key is to make sure the tags are comprehensive.

ELECTRONIC

For those who prefer to collect their information electronically, it is often helpful to identify your primary information collecting tool, for example OneNote or Evernote. (Remember that you have specific tools for



collecting actions and diary related items, this tool is just for collecting information). Whichever tool you choose, it ideally needs to be accessible wherever you are, and therefore for most of us that means something that can be accessed on our smart phones, as well as accessed through our computer/tablet (which OneNote and Evernote both can).

I am going to work through an example of how you can do this based on Evernote (other systems work in a similar way). Evernote uses the following:

- **Notes:** individual pieces of information. This is the equivalent of a piece of paper.
- **Notebooks:** collections of related notes. This is the equivalent of a file.
- **Notebook stacks:** collections of related notebooks. These are created by dragging a notebook on top of another notebook. This is the equivalent of a filing draw.

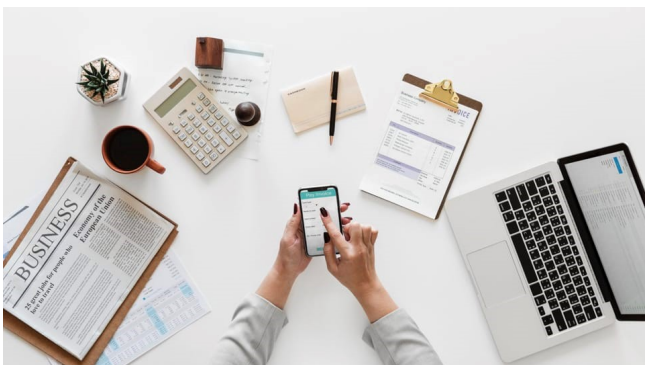
(OneNote's equivalent is Page, Section, Section Group and Notebooks, adding an extra layer of structure).

Start by identifying the different big areas of your life. Ideally keep these to a small number. For example: work, home, family, personal, church (if that is different to work). These areas are your top level structure and can be created in Evernote by using Notebook stacks.

In each area identify the current projects or roles you might want to collect information on. For example: in family you might have summer holiday, or in work you might have sermons. These are your Notebooks.

Then each piece of information is placed in the relevant Notebook as a Note. For example in the summer holiday Notebook I may have a Note about the possible ferry options, another Note about places to visit, another Note about travel insurance.

In addition to all of the above rename the standard 'First Notebook' automatically set up when you open an Evernote account to 'Inbox'. From this point on the approach is the same as paper. Use the inbox as the place where most stuff goes when you are collecting it. Copy



across a quote into your inbox. Take a photo or scan the bank statement when it arrives into your inbox. Put the link to the blogpost in your inbox. Record a voice memo into your inbox. Use web clipper to capture the content of a webpage. Forward an email from your email account into your inbox. .

'Most of life's information can be added to your information tool.'

TIM CHALLIES

There are occasions when it won't take much more time to put it straight into the relevant Notebook, in which case do that, but for the rest of the time simply put everything into your inbox folder. Then in the same way as for paper, process your inbox folder on a regular basis, moving things into the relevant Notebooks or deleting them. Then add any relevant tags that will help you access the information at a later date.

Here are some other ways I use my information tool.

- **Meetings** I record all my meetings electronically, using a variety of templates to create meeting proforma which include agenda, notes and action points. These are then all stored in a Notebook related to the topic, project or role.
- **Note taking** I take notes on talks or sermons and keep them in relevant Notebooks.
- **Venue investigation** When we are looking for a venue for something I create a Note with photos and text so that I can see what it was like when reviewing whether to use it in the future.
- **Kindle** If you use Kindle for reading books (App or Tablet) you can highlight things in the book, and also make notes. These are saved in Kindle. You can go to your highlights/notes and then copy them into a Note.

Alongside this structure for storing electronic information there are a variety of other electronic systems we might use, mainly related to data and photos/videos. For example:

- **Photos** These are automatically collected for us on our phone. But we still need to manage them. For example, a monthly cull of photos you took and no longer want is a good idea. Tagging the rest of the photos will mean it is far easier to find what you are looking for three years later when the image is buried amongst thousands of other images. Putting them in folders is another way of ensuring they are more accessible. If in addition you have a camera, downloading photos onto a hard drive and ideally into the same software you use for your phone images will mean you are only working with one system.

- **Church membership roll** Many churches now use software to keep data on church members (ensuring they comply with GDPR). There is a review of many of the software packages [here](#). Most have a variety of functions, including rotas.
- **Gift aid** A simple spreadsheet can keep track of gift aid returns, although there are a variety of software solutions online, for example [FundFiler](#) .

Stage 3: Accessing

If we have set up stage one and two well, stage three should be simple. We have a structure that means we know where to go to find what we need. We have used simple methods that mean that things are stored in a way we can quickly find what we are looking for within a file or

folder. This is the beauty of a good information tool. It works.

Further Ideas

- For further ideas on how to organise photos see [this](#) article, which also links you to a professional online [photo organiser](#).
- [If This Then That](#) is a great website for finding ways to automate things. For example, each time you like a quote on Twitter it automatically gets sent into a folder in Evernote.
- There is an interesting compendium of articles [here](#) on how to organise information.

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PLANNING YOUR WEEK

ORDERLINESS GUIDE 6

What To Do?

A weekly review is one way to prayerfully consider what to do in the coming week. It is about reconnecting with our sense of vocation, the priorities we believe God has for our life, and then stewarding our time energy and attention well through the week. We've created two approaches to the review: an extensive approach and a simple approach (see below). The extensive approach is likely to take between 30-60 minutes, depending a little on how effective we are at keeping on top of stuff during the week. The simple approach may only take 10-15 minutes.

A weekly review works best if you have also worked on your basic weekly schedule (sometimes called your ideal week). This is a way of planning out what a good week would look like, identifying the activities that occur every week and the ones you want to occur every week. You can download a [template](#) from Michael Hyatt's Free to Focus tools website. This gives a shape to your week and prevents you from having to put some items in your dairy or on your to do lists each week.

PURPOSE

Dave Allen suggests there are three things we are trying to achieve through a weekly review:

- **Get clear** It is about clearing up our workplace and work tools, ensuring that everything is in its right place so we are ready for work.
- **Get current** Reviewing our diary and lists to ensure we know what is still to be done, what is coming up and what needs to be done.
- **Get creative** Engaging with ways to surprise others, do good, and engage with our longer term goals.

PRINCIPLES

- There is no one way to do this, find a way that works for you and master it.
- Identify a time each week when you are going to do your weekly review. Put it in your diary. Some prefer at the end of the week to finish their week well, although others find they don't have sufficient proactive energy to do it then. Some prefer Sunday evening as a way to prepare for the week ahead, others prefer first thing on a Monday morning.
- Identify a place where you are going to do this, where you won't be disturbed or distracted. Some choose to use their place of prayer as this is a prayerful

'Of all the productivity hacks I've learnt over the years, this is the one that has had the biggest impact when I've followed it, and creates the biggest loss of focus when I forget it.'

CHRIS GREEN

consideration of how to steward God's resources.

- Make sure you have all the necessary tools easily accessible to conduct the review well.
- Adapt whatever template you start with to fit your approach to orderliness.
- Don't skip planning, even when you are very busy and under a lot of pressure. In fact, this is probably the time we most need to plan our work.
- Be sure not to plan every minute of every day. We need to leave space for the surprise, spontaneous and unpredictable. It is suggested around 70% of our time planned is about right.



'Perhaps the most important benefit of a weekly review is you get rid of that nagging feeling that looms over you that life is out of control and things are falling through the cracks.'

LAURA MCCLELLAN

An Extensive Approach

We have taken ideas from many places to create an extensive approach to a weekly review.

STEP 1 PRAY

A few moments to seek God's purpose and prompts for your life.

STEP 2 CLEAR

Sort through your workplace and work-tools to get them tidy and all your 'inboxes' empty.

- Physical.
- Electronic.

STEP 3 RECONNECT

Reconnect with the things that bring focus and motivation to your life

- Read your Personal Vision Statement or rule of life.
- Consider your goals for the year.
- Reflect on accomplishments from the past week.

STEP 4 DISCERN

What might God be calling you to focus on this week?

(a) Think

- What are the most important things to do this week?
- What do I need to do this week?
- What would I like to do this week?

(b) Review

- 6x6 review.
- Diary review.
- Lists review.
- Life review.

STEP 5 ORGANISE

What are you going to do this week?

- **Prune** Looking at all the possible things to do, what are you not going to do to make your week more realistic?
- **Prioritise** Alongside existing commitments, what three things must you accomplish this week to advance your projects?
- **Plan** Schedule any items that need to be scheduled.
- **Prepare** Get any materials ready for meetings or tasks that will aid your ability to do them well when they arise (notes, tickets, reading, documents, address).

We have a template for this extensive review in an Excel spreadsheet.

Simple Approach

Check your diary and your various task management lists. In the light of these prayerfully ask yourself:

- What can I learn from last week?
- What do I need to do this week?
- Who can I bless this week?
- What would I like to do this week?

Further Ideas

- Chris Green's excellent [blog](#) on 'your most important meeting of the week' and a further post [here](#).
- [An overview of the process.](#)
- [A guide to a weekly review based on questions.](#)
- A [video](#) by Dave Allen on the review.
- [One person's' approach.](#)
- A wide [range of ideas](#) from 'productive woman'.

'No matter how organised you are, how together your system is, how careful you are about processing your inbox, making a task list, and working your calendar, if you don't stop every now and again to look at the "big picture", you're going to get overwhelmed. You end up simply responding to what's thrown at you, instead of proactively creating the conditions of your life.'

JUSTIN WAX



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PLANNING YOUR DAY

ORDERLINESS GUIDE 7

What To Do?

Rather than simply being reactive to what comes up through the day, it helps to be proactive in deciding what we are going to do. Things get done because we give them time, energy, and attention. The daily review is a simple way to reflect on how best we might steward the day that lies before us.

A daily review works best if it is linked to a weekly review where we have already given some thought to what we need to focus on in the week as a whole (see Guide 7 on Weekly Review). It also works best if we have established a basic schedule for the week and some daily routines (for example: morning, workday start up, workday close down and evening rituals).

'For me, scheduling a day is a substantial anxiety reliever. Once I started doing this, I realised that I was wasting hours every day worrying; thinking about getting things done without actually making progress on anything. Worrying can be a massive time suck.'

DEB KNOBLEMAN

PRINCIPLES

- There is no one way to do this, find a way that works for you and master it.
- Identify a time each day when you are going to do your daily review. Put it in your diary. Some prefer at the end of the day as they think ahead to the next day, others prefer to do it at the start of their day. Whenever we decide to do it, incorporate prayer into it. For this reason some people like to do their daily review as part of their rhythm of daily prayer.
- Keep it simple. The daily review should ideally take no longer than five minutes.
- Schedule your day at around 70% capacity. Above that and there is no room for the unexpected, the spontaneous, things over-running, to go for a brief walk, time to think.
- When considering the day try to consolidate time into larger chunks where you can focus on one type of activity. Constantly switching between types of tasks is less effective than focusing on one type of task. This is why doing your emails in batches is better than doing them throughout the day.
- Focus on outcomes not activities. Don't ask what tasks need to be one, do ask what outcomes need to be accomplished, and then schedule your day around activities that lead to those outcomes.
- See the day in terms of people and relationships first, tasks second.

- Ask in everything how can I build others up, go the extra mile, bless others.



An Approach

We have taken ideas from many places to create an approach to a daily review.

STEP 1 PRAY

Coram Deo is a Latin phrase that means 'in the presence of God'. We don't plan our day independent of God, we plan it in the presence of God, so take a few moments to seek God's purpose and prompts for your life.

STEP 2 REVIEW

This is where we catch up with things that will guide our decision making about what to do this day.

- **Diary** What appointments do you have? List any actions that need to be accomplished for these

appointments. Identify how much unallocated time you have left for the day.

- **Task management tool** Process any tasks in your inbox (defer, delegate, delete) to get your inbox to zero. Don't do any tasks at this point. During the previous day, and often during my prayer time in the morning, a whole bunch of stuff has come up that I have recorded into my task management system. These are the items I am mainly processing at the start of my daily review.
- **Daily to do list** Check what is already on your to do list for this day.
- **Weekly review** Reconnect with your weekly review list of things to do this week.
- **Next 3-5 days** Check what is coming up over the next 3-5 days that needs to be done today.
- **Anything else** Record anything else that may need to be done.

STEP 3 REFLECT

Use these three questions to reflect for a moment before you create your daily to do list.

- What would a good day look like today?
- What am I most likely to resist? Why? It helps to think this through as it may alert you to something that you need to proactively do to ensure a task gets done (see our guide on daily to do lists for ideas on how to overcome resistance).
- What is my energy level as I enter the day? Which tasks require what level of energy?

STEP 4 DECIDE

Write your daily to do list. See Guide 8 for ideas on how best to do this.

Implementation

It might help to create a simple template/checklist for your daily review that guides you through your process. It is then a matter of completing your review at approximately the same time each day. It is particularly important to do this when you feel under most pressure and therefore are tempted not to do it! There are many times where I have looked at a day and felt somewhat overwhelmed by all that needs to be done. Five or so minutes stopping to think about the day has nearly always relieved the sense of pressure and helped me to make more sense of the a busy day.

Further Ideas

- A helpful article on [thoughts for structuring your day](#) by Matt Perman, author of What's Best Next?
- [Seven tips](#) for planning your day.
- A slightly different take on daily planning from a video reflecting on Benjamin Franklin's [plan for a day](#).

'Every minute you spend planning saves 10 minutes in execution.'

BRIAN TRACY

'A lack of white space in one's diary correlates to a lack of white space in one's brain.'

MATT PERMAN

JAMES LAWRENCE
WWW.CPAS.ORG.UK



CREATING A GREAT DAILY TO DO LIST

ORDERLINESS GUIDE 8

Introduction

There are a whole variety of lists that we might use (check lists, projects lists, task lists, waiting for list) but the most commonly used one is the daily to do list. This guide offers some ideas on how to construct and use a daily to do list as part of the process of identifying how we use our time and energy on any particular day.

'No approach to organising your lists will work if you do not regularly review those lists.'

MATT PERMAN

Principles for To Do Lists

- There is no one way of using a daily to do list: the key is to find a way that works for you, and master it.
- Lists are susceptible to 'planning fallacy', we think we will do things more quickly than is realistic, so be prepared to renegotiate your list through the day.
- Don't put other items on your daily to do list, for example additional things that you remember you have got to do later in the week, or a great idea for another project you are working on. Have a separate way of recording these things
- Try to find a way of creating a daily to do list that is attractive for you (post-it note, Bullet journal, App, paper, screen etc.). I chose my App on this basis over against other possibilities. I liked the font, layout and colour scheme as well as the functionality. This means it has 'drawing power'. I like using it.

However, if we create a list and only ever allow ourselves to do the things that are on our list we may miss some wonderful opportunities to serve others, to be spontaneous, to create surprises. A daily to do list is a guide, a strong guide, but a guide nonetheless.

How we use a to do list will be shaped by whether we see our primary ordering tool as the diary or our task management tool. Those who use their diary as their primary ordering tool are likely to have most of their big pieces of work in their diary, leaving relatively little space for other tasks. Most of the items on their daily to do list will probably be quite small.

Those who use their task management tool as their primary ordering tool are likely to only have meetings in their diary, and their daily to do list is more likely to include some big items.

It's Purpose

A daily to do list guides us in our tasks for the day alongside the things that are already in our diary. It doesn't have to be very complicated (a post it note may well be sufficient).

'Guides' is an important word here. If we create a to do list and then ignore it, rarely accomplishing anything that is on the list, there is little point in creating it in the first place. We will not only end the day with lots of things still to do on the list, but also a sense of frustration or disappointment.



And obviously on any given day if your diary is packed with meetings you will have less time to do other things, whereas an emptier diary provides an opportunity to work on more items or larger items.

A Process

Each day identify the things to do that day. What we decide to add to our daily to do list is best informed by two 'reviews'.

- **Weekly review** Many find a weekly review a helpful way to plan their work for the week, taking into account (a) how much space they have given their diary commitments for that week and (b) their larger goals for the period of time they are in (discerned as part of a wider process). A weekly review typically takes

between 30-60 minutes. See Guide 6 'Conducting a weekly review'.

- **Daily review** This enables you to plan what you are going to do today. It doesn't take long, but does ensure you are (a) clear about your actions for the day ahead, (b) identify when is the best time to do them (according to complexity of task, personal resistance to doing it, and the level of focus you need to do it), and (c) how they will fit in with existing diary commitments for that day.

Tips for Your Daily To Do List

WHEN TO DECIDE YOUR LIST

It is best to decide your daily to do list at either the end of the previous day or first thing on the day.

The list may well need reviewing as the day progresses, and changes made to it in the light of (a) things taking longer than expected (b) unexpected opportunities (c) changing priorities (d) changing mood, energy level, personal circumstance. However, over time, hopefully we improve our ability to set a realistic, appropriate and sensible list for our day so changes become less common.

HOW TO WRITE YOUR LIST

When adding items to your to do list ensure you write them as an action, not information. Each action ideally describes exactly what you need to do.

Clarity here makes a big difference, as it ensures you know exactly what has to be done when you look at your to do

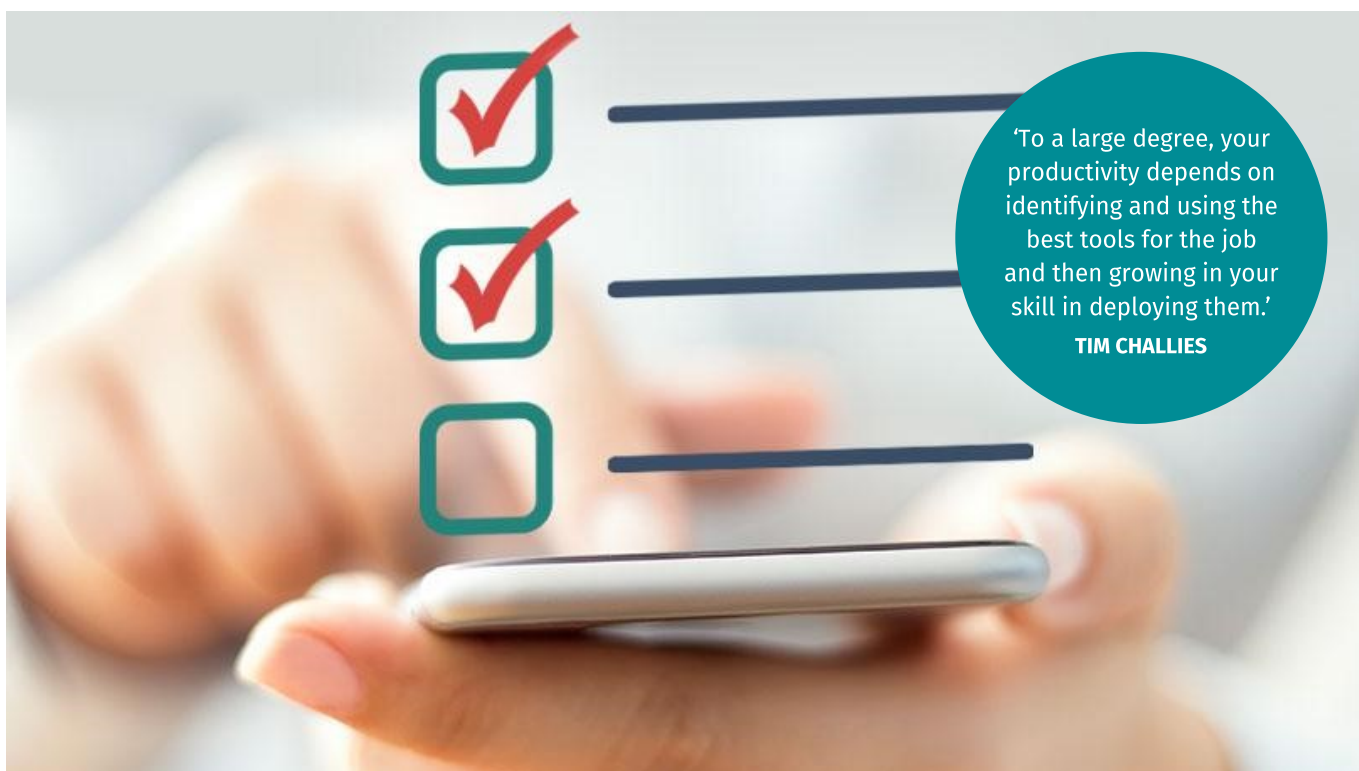
list. Two things can help gain this level of clarity.

- Use the structure of verb, followed by a subject and an object.
- Try to picture yourself doing the action, something physical that involves an action. For example 'follow up N about the report.' becomes 'Call: N to finalise report.'

For some it may help to nuance your list by identifying alongside each item:

- The energy level required to do the action. Through the day our energy fluctuates from high to low and this impacts our ability to focus on any given task. Simply writing next to the item on our to do list whether it is a high (H), medium (M) or low (L) energy task can guide us as to when is the best time to do that task in the day.
- The time you think it will take to do it. Some items on the list may be very quick (5 minutes), others may take substantial amounts of time (60 minutes).
- The importance of the task. It may help to grade the importance, either using a scale (for example 1-5) or a colour scheme (this can often be done in Apps using a priority grading system).

For example 'H/30/1' might indicate 'high energy level for a task taking 30 minutes, which is high priority'. This can help you work out what to do when i.e. if you have 30 minutes available when your energy level is medium you can look at your list and decide to do two 15 minute tasks requiring medium energy level.



'To a large degree, your productivity depends on identifying and using the best tools for the job and then growing in your skill in deploying them.'

TIM CHALLIES

RECORDING WHAT IS DONE

Ticking items on our to do list provides a small hit of satisfaction. It provides a sense of momentum, of completion. Some people find it helpful to take this a little further and keep a bigger 'done' list or done wall. It provides motivation and energy for further work. This might be a list of all the things you have 'done' that week, or a post-it wall where all the done items are 'posted' as a visual reminder of progress made.

Linked with above, when things come in that aren't expected that you have to do, after you have done them add them to your to do list and then tick them off. It helps show the reality of most people's working day, that we might not actually get everything/most things on our to do list done, but that doesn't necessarily mean we haven't done anything.

OVERCOMING RESISTANCE TO DOING THINGS

If you find yourself resisting doing things on your list, ask yourself why? Normally it is because we have too many tasks to do, or we find a specific task somewhat overwhelming, or a tad boring.

Too Many Tasks

For some people having too many tasks on their list leads to a kind of paralysis, 'where do I start?' But the reverse can also be true. If we have too few tasks on our list we may never get round to doing any of them. There is some research that suggests that five or six seems to be the optimum number. It is enough to mean you know you have to get on with stuff, but not so much that you feel overwhelmed, (see the flexible five approach below for a nuance of this approach).

Feeling Overwhelmed

There are a variety of helpful ways of approaching 'overwhelming' tasks.

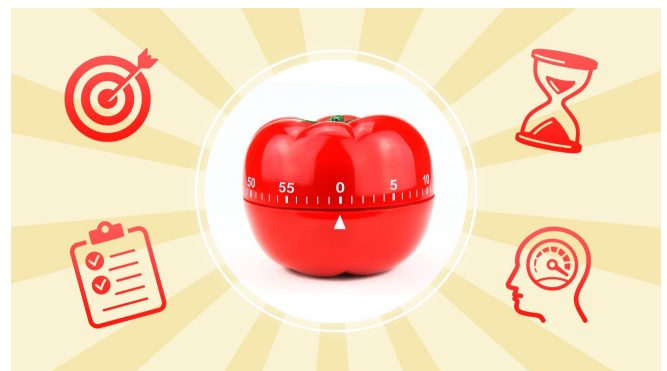
- Check you haven't listed a 'project' on your to do list i.e. something that requires multiple steps to complete and is fairly complex. If it is a project, transfer it to your project list, and identify the next action to take and put that on your daily to do list.
- Break the task down into smaller actions. For example, if you have to write a report, say to yourself 'I'll just get those jottings I made about it out of the drawer', then say 'I'll just write a few notes on a possible structure for the report,', then say 'I'll just write the first section' and so on.

Work on the task in short bursts, perhaps using the Pomodoro technique listed below. This means that you know you aren't trying to do the whole thing, just a part of it.

Feeling Bored

Some things we have to do are boring, we simply don't enjoy doing them but they still need to be done.

- Some people say it is best to do these tasks first, get them out of the way, otherwise they just 'hang over' you for the rest of the day with a sense of dread. Others find it easier to do these after they have done one or two tasks that they enjoy doing because these provide a sense of movement and energy to tackle the more mundane task. There is no one right way. Find out what works for you, and then be disciplined in using that approach.
- Limit the amount of time you are going to spend on a dull task and then reward yourself with a short break (see the [Pomodoro](#) technique for a clever way to do this).



OTHER IDEAS

Here are a variety of other ways of shaping your daily to do list. Again, there is no one way of doing this, find a method that works for you and master it.

Eisenhower Matrix

Popularised by Steven Covey in Seven Habits of Highly Effective People, this matrix helps you identify the importance and urgency of a particular action. The image below is from James Clear's helpful [article](#) on the matrix, where he explores the origins of the matrix and how to

	URGENT	NOT URGENT
IMPORTANT	DO Do it now.	DECIDE Schedule a time to do it.
NOT IMPORTANT	DELEGATE Who can do it for you?	DELETE Eliminate it.

use it when trying to prioritise what to do on any given day. There are different approaches to the matrix, so don't be surprised if you come across other ways that people suggest you use it.

1-3-5

Write down one big task, three medium tasks, and five small tasks. Depending on your preference (and procrastination tendencies), either knock off some of the small tasks first to begin to build momentum in your day, or dive in straight away with the big task to ensure it gets done first. This approach can also be adapted to 1-2-3, one big task, two medium tasks, and three small tasks. For a template for this approach go [here](#), and to this [website](#) to use an online version on any device.

The Flexible Five

If you struggle with procrastination you may find this approach to your daily to do list helpful. It is adapted from Secrets of Productive People by Mark Forster, chapter nine.

- Write out a list of five tasks. Tasks can be any size, but write them so it is clear what finished is for each task.
- Do the tasks in order, you don't have to finish them – just do some work on it.
- If you finish a task cross it off your list.
- If you work on task and don't finish it, cross it off the list and re-enter at the end of the list.
- Repeat this process until you only have two tasks left on the list.
- Add another three tasks and repeat.

Kanban Board

This is a very visual way of seeing the status of your actions on a board. You list them under to do, doing or done and track their progress. This can easily be done using post it notes and a wall, or you can use online tools or Apps to track your items. Find out more [here](#).

The To Do List

Just about everyone in a leadership role will have a daily to do list of some kind. Two questions might help us as we reflect on our current method:

- How well does my current way of using a to do list work?
- Could I improve the way I use such lists in any way?

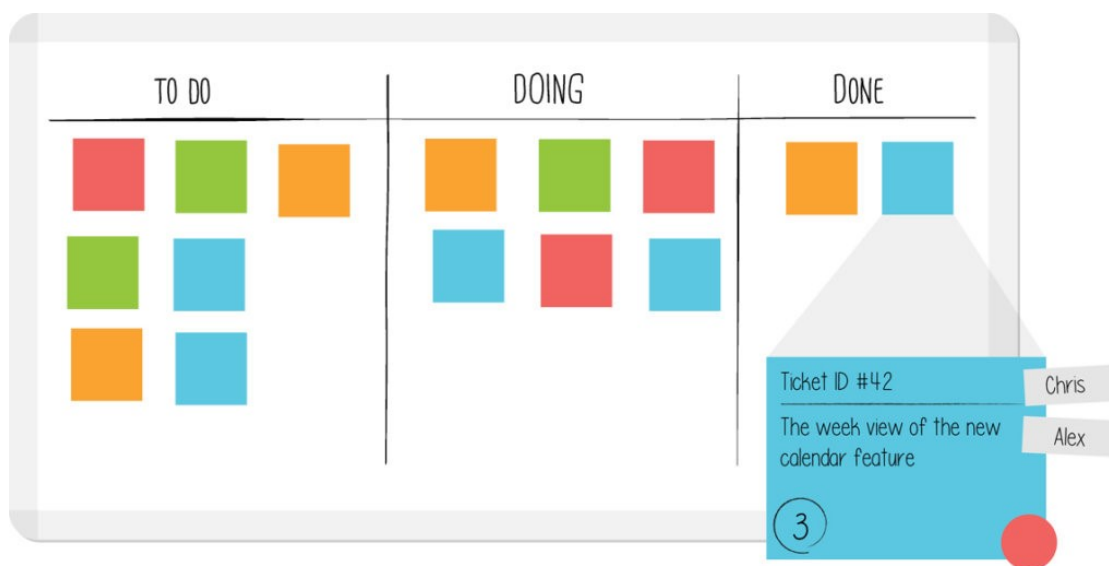
It is time well spent to review our practice and try to develop the most effective way to create and use a to do list for ourselves. Perhaps set aside a couple of hours to review and tweak your existing practice. For example, if you use an App like Todoist, their online blog has lots of practical ideas and guides on how to make the most of the App.

SUGGESTED APPS

Todoist Across platform task management App. Can create category, project, task, subsets within tasks. Can sort by date, by priority. Can't add notes in free version. Excellent App for complex list handling.

Swipes Multi platform and web based task management App. No categories, can date, assign a label, add notes. Great for simple to do list.

Asana Ideal for cross team project planning. Multi-platform. Can assign tasks to others, add notes, create sub sets in projects.



TOP TIPS FOR FUN FILING

ORDERLINESS GUIDE 9

Introduction

Filing. Not exactly a topic to get the heart racing. Or perhaps it is. Maybe you experience heart palpitations whenever you think of filing because you know the piles of stuff that is backed up on your desk (and perhaps your shelves, chairs and floor). Every time you look at it you think I must do something about it, but then don't know where to start. Or maybe your hard drive is a mess, you struggle to find things and you long to have a more effective way of ordering your files and folders. Read on. This guide is about fast, fun and effective filing.

'The lack of a good filing system is one of the biggest bottlenecks in personal management.'

DAVE ALLEN

Paper Filing

We were once promised a paperless office, but somehow that reality has never arrived for most of us. Here are some tips on handling paper well. See also Guide 5 on 'How to Store Information'.

1. DO LESS OF IT!

I know, I know, stating the obvious. But doing less of it is a good starting point i.e. do you really need to file that item? Much of what gets filed never gets looked at. So, when you open a letter, return from a meeting, are given something... ask yourself do I really need this? Often someone else will be responsible for keeping it, in which case you probably don't need it. Bin it.

2. CREATE A SIMPLE SYSTEM

There are incredibly complex filing systems out there, but in reality a very simple one will normally suffice. For most of us there are three types of filing:

- **Working** Things we are currently working on and need to access regularly. Ideally these items are within reach of our main working space. I often use two things for my working files. (1) Ring files for any meetings I regularly attend to keep relevant paperwork in, clearly labelled so I can instantly take it down off the shelf and take it with me to the meeting. (2) Hanging files for any other items I may need to access regularly, in an under-desk filing draw.
- **Reference** Things we are likely to refer to. Ideally this is in the same room/area we work in. These items are normally in my filing cabinet.

- **Archive** Things we need to keep but rarely look at. These can be located in a different room or even building. They can be put in archive box files, but must be clearly labelled.

For your filing cabinet, the simpler the better. Alphabetical is a good starting point. Clear labelling is vital.

And one further useful file, a bring forward file. This is a file with monthly separators in it, January to December. You place in the relevant month in a wallet anything that relates to a one-off meeting/event for that month. Then when the event comes all you need is instantly to hand.

3. DECIDE THE MOST EFFECTIVE WAY FOR YOU TO FILE

There are likely to be two choices:

- **Batch it** Have one receptacle where you put everything that needs filing and once a week/fortnight do all your filing in one batch. For this to work, you must place all items instantly in the receptacle when you have stopped using them, and you must do the filing once a



week/fortnight (or thereabouts) so it doesn't build up.

- **Do it as it arises** Whenever you have a piece of paper that needs to be filed, do it there and then.

People will differ in their preferences here. Just choose what works for you.

When it comes to filing, make quick decisions about each item and place them in the relevant place. Or create a new file when that is necessary. Occasionally you may come across something and you are not sure where to file it. Perhaps it could go in a couple of places. In which case, you could copy it and put it in both, so six months later when you are likely to be equally unsure where you filed it you will find it quickly in the first place you look.

4. HAVE THE RIGHT EQUIPMENT TO HAND

If you use four hole ring binders, make sure you have a working four hole ring punch on your desk and a spare set of binders. If you use plastic wallets, have a plentiful supply to hand. If you use a filing cabinet, make sure you have spare dividers and a simple means of labelling them to hand. If you can't access the right materials instantly you won't do your filing.

5. CLEAR OUT WHATEVER SYSTEMS YOU USE AT LEAST ONCE A YEAR

In a slightly less busy time of the year, go through all your files and clear out anything you haven't used for a year, either to bin or archive. This sort of thing needs to be put in the diary otherwise it rarely gets done and your filing systems become too full and unwieldy, and then you can't file anything else and the backlog grows.

6. ENJOY

You're wondering about the fun element aren't you? Well, be creative and choose your fun. Some place a large jar of M&M's (or equivalent) on their filing cabinet and whenever they file an item have one. Others treat themselves to five minutes on a fun App that they can use when they have done their batched filing for the week, or a magazine they read. You get the idea, a treat that rewards you for fast and simple filing that brings a smile to your face when it is done.

Electronic Filing

The most helpful tip I've heard on filing is to try and use the same filing system across all your files i.e. the same folder structure for paper, email folders, on your hard drive, in Dropbox, Evernote and so on. This means when



you turn to any filing you are used to the folder structure and don't have to flit between different ones.

With this system in place the principles above apply, but with one significant difference. With electronic stuff it is generally best to file it straight away. So, as soon as you have finished replying to that email that you need to keep, file it. When you have created that document for a project you are working on, file it in the relevant folder on your hard drive. When you come across that really helpful quote related to a topic you know you are going to be preaching on, file it in the relevant Evernote folder.

Emails

There is a debate on at the moment about whether to file emails at all or just leave emails in your inbox and use the search facility to find what you need. I am on the file side of the debate, but quite understand why others prefer not to. I also copy myself into emails I need to keep a trail for, and when my reply lands in my inbox, immediately transfer it to the relevant folder in my Kept folder. Others use the Sent folder (automatically created by most email systems) for this, relying on the search facility to find previously sent emails for information they might need. Like the Deleted folder, I tend to empty this Sent folder every six months or so of all items that are six months old or older.

The simplest email folder structure might be:

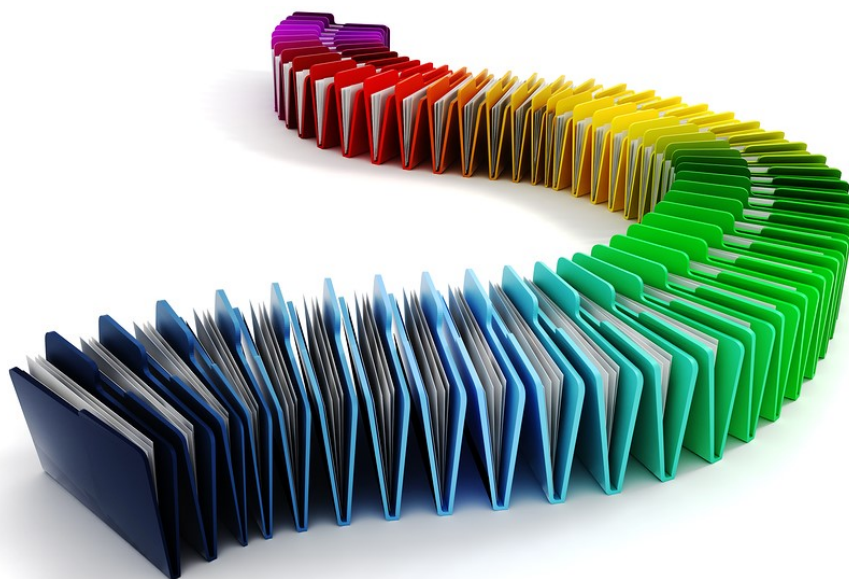
- **Inbox** This is where your emails enter your system. The key here is to process your emails, not check them, ideally once or twice a day. Once processed you then decide what to do with them (see Guide 10 on 'Handling Emails').

- **Deleted/Trash** This is where emails automatically go when deleted from your inbox. Be sure to turn off the automatic empty feature and then empty your deleted folder every six months (or whatever timescale works for you).
- **Read** Place in here anything that you might like to read but don't have time or inclination to read straight away. Then in those spaces where you have a few minutes to read you can go in here and read whatever takes your interest. Once read, the item then needs deleting or referencing.
- **Waiting** Place in here anything that requires action by another person before you can process the email completely. Be sure to check this folder at least once a week so you can chase people up if they haven't replied.
- **Reference/Kept mail** (or archive) Place in here everything you want to keep for future reference. You can either put them in subfolders (following the structure of your other filing systems) or use the search facility to find things when needed.

Obviously you can have many more folders than this, but it is good practice to keep your top level folder structure as simple as possible, and reflecting other filing structures you have elsewhere for paper and your hard drive.

Further Ideas

- [The art of filing](#).
- [Eight tips for organising your paperwork](#).
- [How to set up an effective filing system](#).
- [Nine great ways to manage your computer files](#).



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HOW TO HANDLE THE EMAIL DELUGE

ORDERLINESS GUIDE 10

Introduction

There are many ways of handling your emails. The key is to find a way that works for you AND for those who send you emails. We all have a system. The question is do we have a system for dealing with incoming emails that ensures they are actioned quickly and efficiently and means that when we open our inbox we don't feel unduly stressed, or do we have a system that ensures they pile up and get forgotten about?

Some people's work is entirely emailed based, but that is not the case for leaders. The danger is that we allow our emails to take up our most productive time, or spend too much time doing them.

Six Basic Principles

1. **Establish a method** for processing and keep this processing method as simple as you can (see below).
2. **Don't do them all day, do them in batches.** Research shows we are more efficient when we batch work together i.e. do our emails at the same time. We are also less likely to be distracted which enables us to focus better on whatever we are doing. Work out how long you need each day and then put that time in your diary or as repeat entry on your daily to do list (see below), and ideally choose one of your medium energy times of the day to do them.
3. **Close down your email programme** in between the times you have identified to do them so you aren't tempted/distracted by them. Or, if you need to go into your emails to find information for what you are working on, use a programme like [Boomerang](#) to pause your inbox until you are next due to work on your emails. This prevents any emails entering your inbox during the paused time.
4. **Don't check your emails** (i.e. have a quick look to see what is there but not do anything with them), process them (i.e. follow the process you have identified to deal with each email).
5. Unless you have a pressing need and are very quick at typing on your phone, don't **do your emails on your phone**. For most people it takes more time on your phone (therefore is less efficient) and tends to mean

'One of the most important soft skills you can have is figuring out how to deal with a high volume of email. And the only way to do that is to put some kind of system in place that's simple and repeatable and is going to allow you to have a life outside of email.'

MERLIN MANN

people are doing their emails throughout the day (which goes against the second principle).

6. **Avoid the temptation to cherry pick emails** i.e. only do the ones that you feel interested in doing.

'Email is an abysmal task management tool and a woefully poor scheduling tool. That leaves email as the place for communication – communication and nothing else.'

TIM CHALLIES

'Your inbox is not your to do list.'

GRAHAM ALLCOTT



Get Inbox to Zero Now

To do this you need two parallel processes.

PART ONE: ESTABLISH A METHOD FOR PROCESSING YOUR EMAILS EFFICIENTLY

- Go to your diary and put in two hours to set up a method for processing emails in the next month.
- When you get to this two hour slot, don't do anything else. Start by working out how many emails you receive on average a day. Allow two minutes per email. For example if you receive on average 30 emails a day you will need 60 minutes a day to process your emails.
- Go to your diary or daily to do list and place a repeating appointment or action for the amount of time needed each day to process emails (for example 60 minutes). You can break this into two or at the most three slots throughout the day. Then process your emails at that time/those times on each day.
- Establish your folder system. The most basic system is a five folder system (see Guide 9 'Top Tips for Fun Filing' for further details).
 1. **Inbox** Where email arrive and get processed.
 2. **Trash** (deleted) Your deleted emails folder.
 3. **Kept mail** (archive/reference) Either one folder and use the search facility to find what you want, or a series of subfolders related to your areas of work/projects.
 4. **Read** For items that you will read when you have a few spare minutes.
 5. **Waiting** Put here emails when you are waiting for someone else to do something. Alternatively use Boomerang's facility to get emails returned into your inbox to remind you that you are waiting for a reply.
- Unsubscribe from any emails you receive regularly that you rarely if ever look at. This simple tip will reduce the number of emails coming in.
- Set up a method for processing emails. A simple one involves four possible options for each email:
 1. **Delete** It will be accessible in your trash or deleted folder if you really need it.
 2. **Do it now** If it is going to take less than two minutes, do it now. Then delete the email or file it.
 3. **Defer into diary or to do list** when an email is going to take significant time or you need more information to process it (diary for any time related activity, to do list for anything else). Then delete the email, file it in kept mail, or copy the email into your diary/to do entry.
 4. **Delegate** Send it on to someone else and then if you need to keep track of it move it to your 'waiting' folder or use the Boomerang.
- Now move on to Part 2.

PART TWO: DEAL WITH YOUR BACKLOG

- Create a backlog folder in your email programme.
- Place all the emails in your inbox in the backlog folder. You are now at inbox zero i.e. you have no emails in your inbox. Phew!
- Make sure you use your method for processing emails established in part one to keep the inbox empty.
- Go to the backlog folder. Arrange emails in date order starting with oldest. Click on the first one and scroll down to a date six months before the date you are doing this on. Hold the shift key and click on the last email six months down. This highlights all the emails that are older than six months old. Delete all these emails. They are more than six months old. There is no point in processing them. If you really need one of them it will be in the deleted folder
- Count the number of emails remaining in your backlog folder and divide by 30. This will give you how many 30 minute slots you will need to process the emails from the last six months. Go to your diary and put in 30 minute blocks over the next few weeks to process this backlog using the approach you have identified above. For example, you have 300 emails in your backlog folder, divide by 30 = ten 30 minute blocks to go in your diary. At the end of these blocks you will have emptied your backlog folder.

One further tip is to think about using voice recognition software to do your emails. Many find this far quicker than typing, and these days it is increasingly accurate.

FIVE POTENTIAL SCHEDULES FOR PROCESSING EMAIL

- **Once a day** If you are someone who orders themselves primarily through a diary, ideally set a repeating appointment around the same time each day during a mid-energy level point. Let people know when you process emails so you set expectations around when you may get back to them. If you are someone who orders themselves primarily through lists, then ensure that processing emails is on your daily to do list, and at the start of each day decide the best time to do it that day.
- **Two or three regular times** Process to zero at specific times two or three times a day.
- **The hourly dash** 10 minutes every hour. Works for those in particularly reactive roles or fast paced working cultures.
- **10-90** Emergency scan early in the day to check nothing urgent, then close down until time to process later in the day.
- **Extreme** Once a week for one hour.

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A QUICK GUIDE TO HOME WORKING

ORDERLINESS GUIDE 11

Challenge and Opportunity

Working from home will be a new thing for many people. You may have one of two instinctive reactions. Some will have looked at friends or colleagues in the past who work from home with a degree of envy, and look forward to the opportunity to have a go yourself. At the other end of the scale, some will be thinking ‘Oh no, how do I make this work with my home situation?’

Aware we will all fall somewhere between the two ends of this spectrum, and that some may find working from home more challenging than they expected, here is a quick guide to home working. It begins with top tips culled from the experience of those who have worked from home for a while, and then considers three common challenges. I’ve also included links to additional material for those who want to explore further.

Top Tips

1. CREATE A COMFORTABLE WORKSPACE

Few will have the luxury of a dedicated room for work, but if possible, identify a workspace in a room and set it up to function well. This may be as simple as a table/desk set up with a chair and some basic office equipment (pen, paper, stapler etc), a computer and phone. Give attention to comfort and ergonomics to make it as suitable as possible for a day’s work. Comfort of the chair, placement of the screen, angle of your arms and wrists, lighting are



all things to consider. For more on this, take a look at [this article](#).

If you don’t have a specific space to designate as your workspace, for example you will need to work from the same space where you normally do your personal work on your home computer, create some symbolic things that help you to know when you are working from that space and when you are doing other things. For example:

- Have a coffee cup that you only use when working.
- Put a post it note on the bottom of your screen that says AT WORK, a sign on the door that says the same.
- Place a small clock in the space that is only there when you are working.
- Remove other items that might be a distraction that aren’t related to work and put them in a box near your space so you can retrieve them quickly when you have stopped working for the day.

And a few other tips for using your workspace well. If at all possible:

- Do your work here and don’t bring other things into this workspace, and try not to take your work into other parts of your house.
- Try not to set up your workspace in your bedroom.
- Don’t eat your lunch where you are working. Find somewhere else, even if it has to be in the same room.
- At the end of the working day tidy it up and prepare it for tomorrow’s work.

2. ESTABLISH A ROUTINE

Going to work helps us by offering a number of routines that bring structure to our working day. As much as possible, establish a similar bunch of routines for working from home. For example:

- Wake up at the same time, don’t have a lie in.
- Get dressed for work. Don’t wear your PJs all day. You may want to wear clothes as if for dress down Friday, but put on your work clothes, and when your working day ends, change into non-work clothes.

- If you normally empty the dish washer before you go to work, or make a packed lunch, or put the slow cooker on for dinner, continue to do these things. They build structure and help your brain get ready for work.
- Walk to work. Some people find it helpful to literally go out of their house, round the block and come back in to the house to start work. And if this isn't possible due to lock down, walk round your accommodation for a minute and then into your space for working. They also end their day by walking home.
- Create a timetable for the day and stick to it. It might look like... Start work at 9am, 15 minute coffee break at 10.45am, lunch break at 12.30, afternoon tea break at 2.45, finish work at 4.45. For those working part time or annualised hours, try to work out a timetable for your day that fits with other responsibilities. Do be sure to build breaks into your day.
- Be careful of the common temptation of home working – the fridge. It is very easy to constantly snack through the day, especially if you are finding your work boring or you are feeling lonely. Eating well helps our energy and attention levels, so try to get some healthy snacks in and lock away or give away the unhealthy ones.
- Set up an alarm on your phone to go off at least every hour (probably best every 30 minutes) and move for a few minutes (we tend to move less when working from home, with less trips to the printer, coffee point, quick conversation with a colleague in a different place in the office and so on). The NHS have some great [10 minute workouts](#) to do in the comfort of your own home, great advice on [moving more](#), and if 10 minutes seem to long try these [five minute exercises](#).
- Be sure to stop work when you have determined to stop work. It is very easy to continue beyond this time, or to sneak back to work later in the evening. On occasions this may be necessary, but try to have a clear time to end your working day.

3. SEE IT AS AN OPPORTUNITY

This is a new way of working, whilst it has its challenges, it also has its opportunities. In particular, we can learn to use some new tools that may well enable better working in the future (for example Microsoft Teams and Zoom). We may also learn new work patterns that will serve us well into the future. Inevitably, as with anything new, there will also be some frustrations, but even these are an opportunity to grow in patience, flexibility and creativity.

For more top tips read [this article](#) based on research among 500 home workers, full of practical tips and ideas. Or for those who prefer to watch something, [this video](#) is a couple reflecting on the lessons they have learned as homeworkers over the last ten years, and [this video](#) is another home worker offering his top ten tips for staying productive without going crazy.



Three Common Challenges

1. BOUNDARIES

Many people find managing the boundaries a lot more difficult when working from home, especially if you have others in your home space during working hours. Where appropriate, try to talk with housemates, partners or children about how you are going to maintain some boundaries around your work time. For example:

- Is it ok for a partner to interrupt you and ask you to put the washing on?
- What level of noise is acceptable?
- Can a housemate ask you a question about a project they are working on?
- How will you handle potential broadband conflicts if everyone wants to be online at the same time during your conference call?
- Who is responsible for the children?
- Can the children come into your workspace and expect your attention?

Each person has to work out their answer to these sorts of scenarios. There isn't necessarily a right one, but what is needed is *clarity* and *flexibility* for you and your individual set up. Be clear about what your expectations are, and then be flexible to rethink them once you have tried things out for a few days.

2. ISOLATION/LONELINESS

Many people find working from home lonely. The normal buzz of an office space, and social interactions, both formal and informal, are missing. The normal recommendations to get out of your home, go to a coffee shop, and meet with people are not so appropriate given our current social distancing policy, so here are a few ideas:

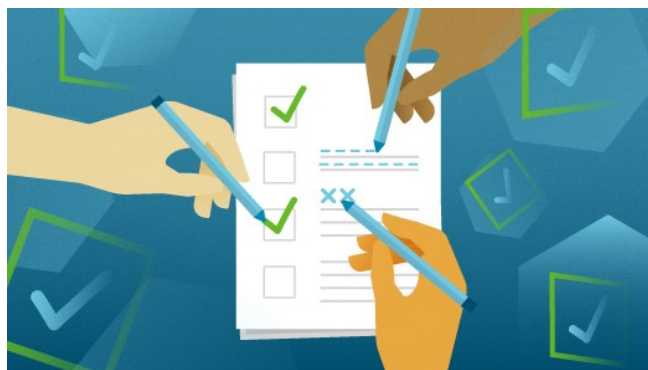
- Arrange a daily online video meeting with your team or colleagues to touch base with one another.
- Share your coffee break with someone virtually (work colleague or friend).

- Work with someone else online with you at the same time, but be clear about what level of communication you want to have. Lots of people find it helps their ability to concentrate just having someone else in the background who is also working. You can use Microsoft Teams to connect via video.
- Listen to music. Generally music without words is best, and [Focus at Will](#) and [Brain FM](#) have created playlists you can use according to what sort of work you are doing (you can also find playlists on Spotify and YouTube; for more on the science behind this see this [article](#)).
- If possible, get out of the house for a walk once a day. If you are able to go with someone even better, obviously keeping an appropriate distance.
- If you're feeling the need for a chat, message a colleague or friend and see if anyone is up for a quick conversation.

Isolation can also exacerbate mental health issues, so if you know you are susceptible to these where possible talk with your line manager about how you might best manage your social contact.

3. PRODUCTIVITY

When we face an empty day with little structure it is easy to fritter away the time and actually accomplish very little. It is also an opportunity to learn new practices that will help bring energy and focus to our working practices. Here are a few ideas:



- Set yourself 'The Big Three'. What are the three things you want to accomplish today? Write them down either at the end of the previous day, or at the start of the day. They won't capture everything you are going to do that day, but the three big things that you need to do for it to be a productive day. For more on this listen to [Michael Hyatt's podcast](#).
- Ideally your daily Big Three relate to your weekly Big Three that you have identified at the start of the week. Same principle, what are the three things to get done this week that will make it a good week.

- Read the CPAS orderliness guide on 'How to focus' (one of a number of articles we have been working on over the last year related to orderliness and productivity), which contains all sorts of ideas on how to focus, eliminate distractions, and handle interruptions. A top tip is to turn off all notifications so that you only go the things when you decide to and you aren't constantly distracted by those tempting banners or pings.
- Reflect on your natural body rhythm for the day and what work is best done when. This is more important when working on your own, as some of the natural things that carry you through your less energised parts of the day in an office aren't there in the same way at home (again see the focus article for more on this). This may also need to link with the wider realities of your home as you manage around child care and other responsibilities, but where at all possible work with your energy levels.
- If you have one, make yourself accountable to your line manager (and if you don't, a friend?) around the things you want to accomplish. Accountability is all about helping us to do what we have decided to do, and most people find they are more motivated to accomplish things if they know someone else will ask 'how is it going?'

There may also be a bit more space for a different type of work, for reflecting and learning, for creativity and planning. Embrace this opportunity. For example:

- Set yourself a clear project to work on: a book to read, a piece of work you simply have never got round to, a new idea you need to research.
- Go through all your emails and delete unnecessary ones, reorder your inbox.
- Think through a better protocol for handling your emails (another of our orderliness guides covers this).
- Reflect on processes you use for other common tasks. Is there a better way of doing them in future?
- Catch up on some CPD (continued professional development) in consultation with your line manager. Is there an online course you could do, a book to read, a webinar to attend?
- Prepare for something coming up later in the year to take the pressure off a future pressure point.
- Have a go at something you've always thought of doing related to your work but perhaps not central to your particular role. Give 10% of your time to it over a couple of weeks and see what develops.

This guide is produced by CPAS. To receive our freely monthly Lead On email full of ideas and insights on leadership click [here](#).