



Time Management for Non-Profits

Garland Coulson "Captain Time"



Your Attitude &
Your Time



How Do You Think About Time?

- “There’s never enough time”
- “Life is short”
- “The clock is ticking”

Stop Being a Time “Victim”





Take Responsibility & Take Control

- Taking responsibility is the first step to taking control

Think of Time as Coins YOU Invest

"Time is the coin of your life. It is the only coin you have, and only you can determine how it will be spent. Be careful lest you let other people spend it for you."

- Carl Sandburg



But My Time Is Set By Work

- Look for available choices within your work
- Usually you choose which task is next and have some leeway as to what to work on when
- You can analyze your tasks and come up with better systems



The Power of NO

- Learn how to say no to things that don't take you to your outcomes
- This could include coworkers, friends, family, volunteer requests and more
- If your time is overcommitted, saying Yes to something adds more pressure and means something you have already chosen has to drop

The word "NO" is written in a large, stylized, hand-drawn font. The letters are white with thick blue outlines. The interior of the letters is filled with blue hatching lines, giving it a textured, chalk-like appearance. The background of the entire slide is a dark green with visible chalk strokes.



Create Your Own Time Mantra

- Something to bring your mind back on track when it slips towards negative time attitudes
- “My time – my choice”
- “Building the life I want – with my every thought and every action”



Systems

- “Successful people aren’t smarter – they just have better systems”
 - - Garland Coulson

Everything in Its Place

- Where do you keep tasks?
- Where do you keep contact information?
- Where do you document your organization's activities and practices?



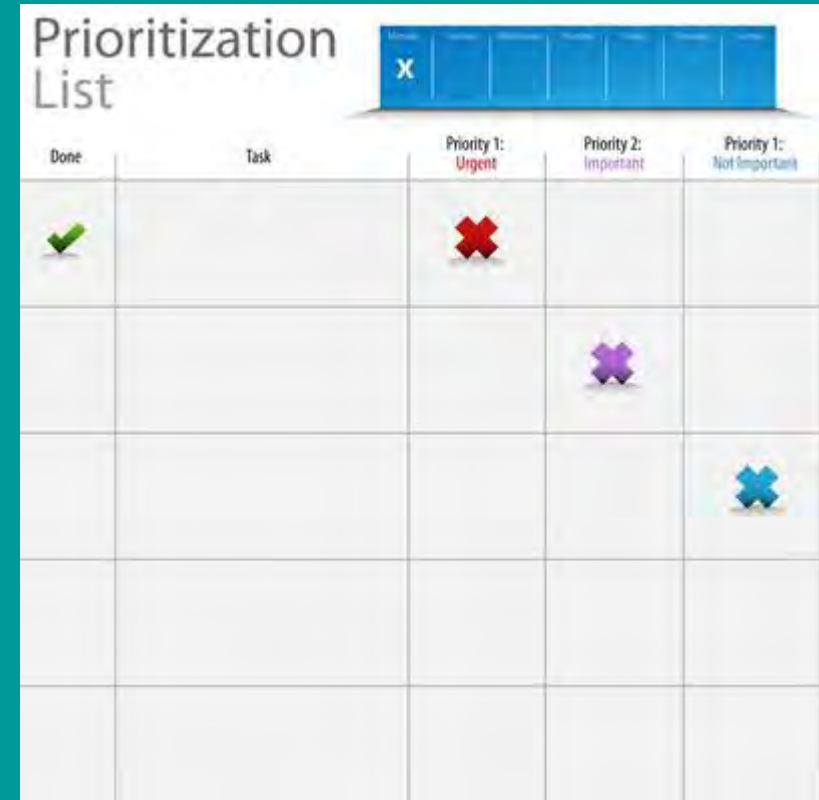
Important Systems

- Task Management – tasks
- Online Calendar – appointments
- Contact Management – people
- Notes Systems
 - Passwords
 - Checklists
 - Documentation



Task Management System

- Place to keep your tasks
- Lets you
 - Set priorities
 - Set due dates
 - Assign tasks to others
 - Add files or links
 - Some let you set status levels or add comments
- “Dashboard” for all the working activities of your organization



Prioritization List

Done	Task	Priority 1: Urgent	Priority 2: Important	Priority 1: Not Important
				
				
				


Welcome Board Private

Using Trello

Welcome to Trello!


 1  May 27, 2015

This is a card.

 1 vote 

Try dragging cards anywhere.

Click on a card to see what's behind it.

 2 

You can attach pictures and files...

 1 

... any kind of hyperlink...

 1

... or checklists.

 1/3

Task Elements

Add a board...

Product Development

Invite your team to this board using the Add Members button.

Drag people onto a card to indicate that they're responsible for it.



Use color-coded labels for organization

Finished with a card? Archive it.

Add a card...

Help

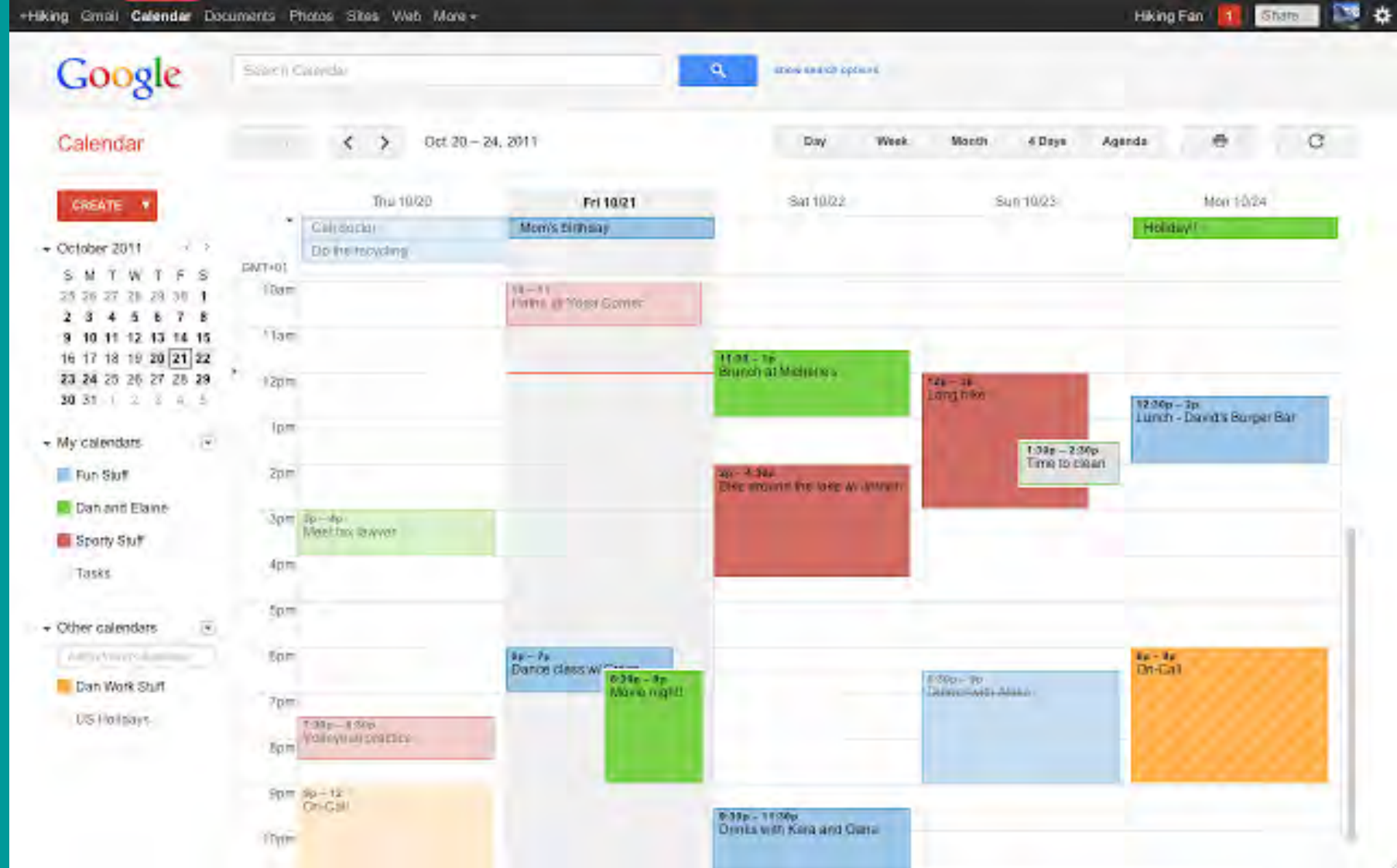
To learn more tricks, check out the manual.

Use as many boards as you want. We'll make more!

Add a card...

Add a list...

Trello



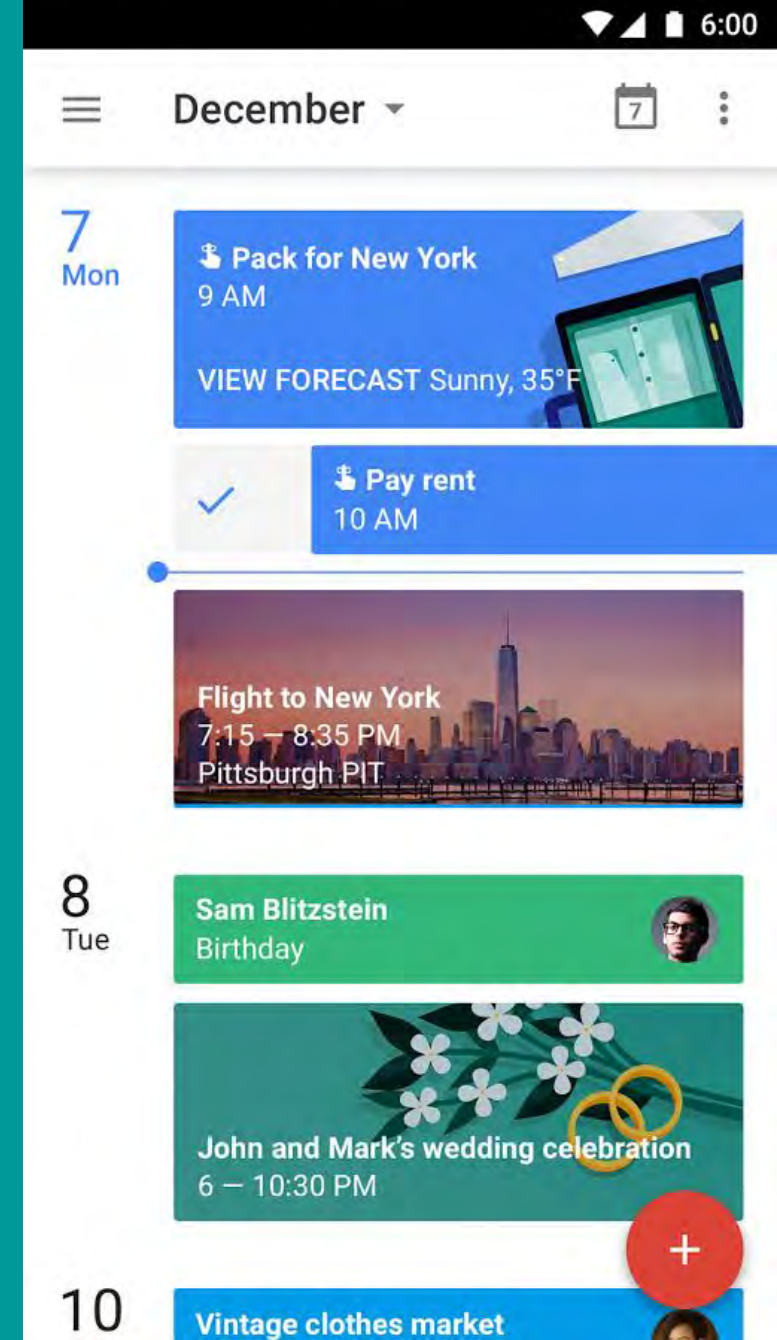
Online Calendar

Online Calendar Benefits

- Can remind you of appointments and calls
- Can be shared with your team or family
- Can work across all your devices
 - Computer
 - Tablet
 - Smart phone
- Can be embedded in your web site

Free Calendar Option

- Google Calendar
- Can have multiple calendars
 - Work
 - Events
 - Personal
- Integrates with other tools






Contact Management - CRM

Contact Management (CRM) Uses

- Keeps organization, suppliers, client, volunteers, donors and staff contact info in one place
- Allows you to take notes
- Lets you schedule the next time you want to contact them

HubspotCRM



Brian Halligan
(Sample Contact)

CEO

ABOUT BRIAN

First Name

Brian

Last Name

Halligan (Sample Contac

Email

bh@hubspot.com

Phone Number

Last Contacted

Lifecycle Stage

Lead

HubSpot Owner

Twitter Username


bhalligan

View all properties

DEALS

+ New deal

COMPANY

 Hubspot, Inc.

HubSpot is the world's leading inbound mark...

New noteEmailCallLog activityCreate taskSchedule


Assign to: Me (garland@captaintime.com)01/27/20162:00 PM

Describe the task...


B I U 11 Helvetica Neue A

Filter timeline (13/17)

JANUARY 2016

 **Brian Halligan (Sample Contact)** lifecycle changed to "lead" Today at 1:53 PM PST

Show more

 Original source: Offline Sources Created 2 minutes ago

Administrator

Password Keepers

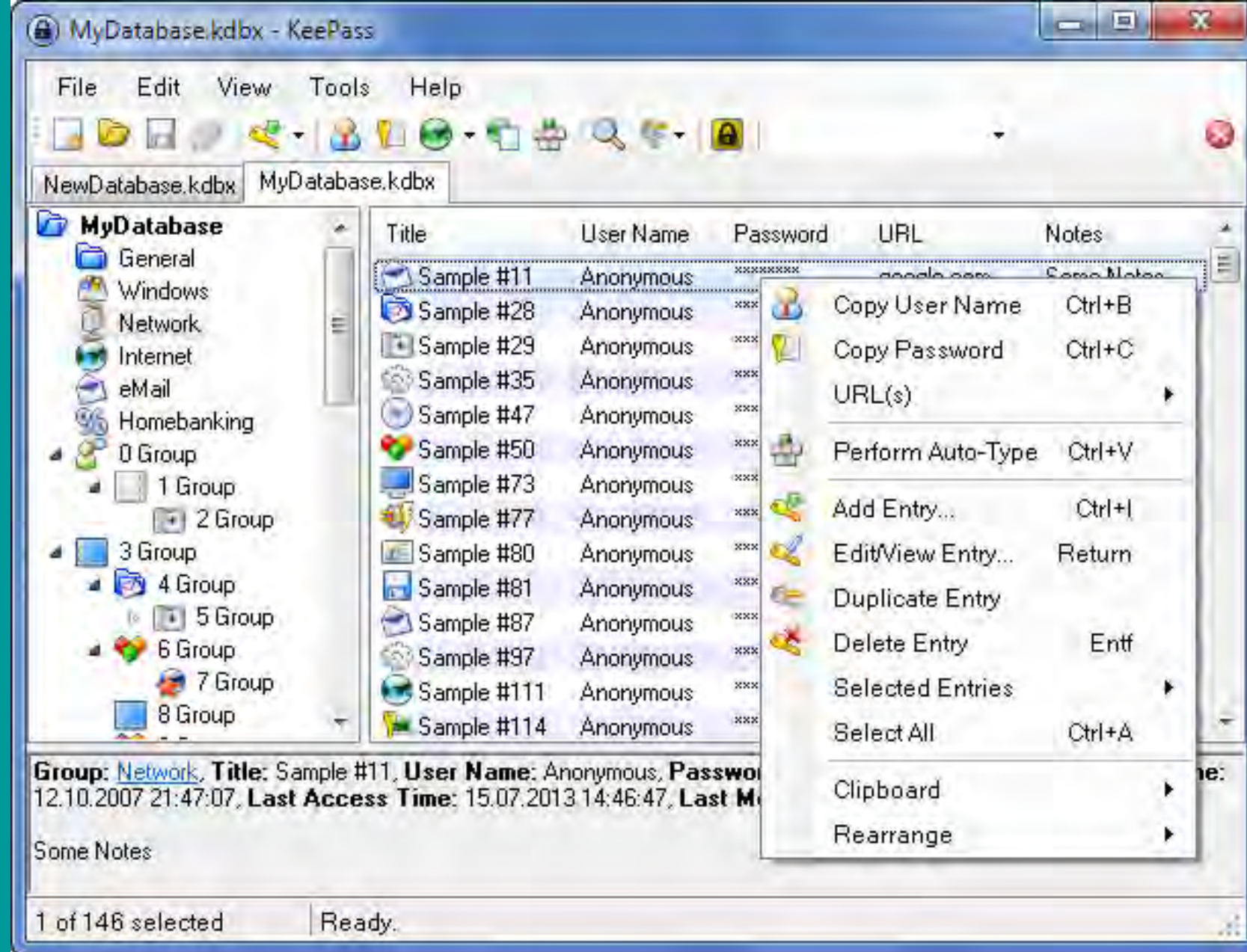
Password:



Log

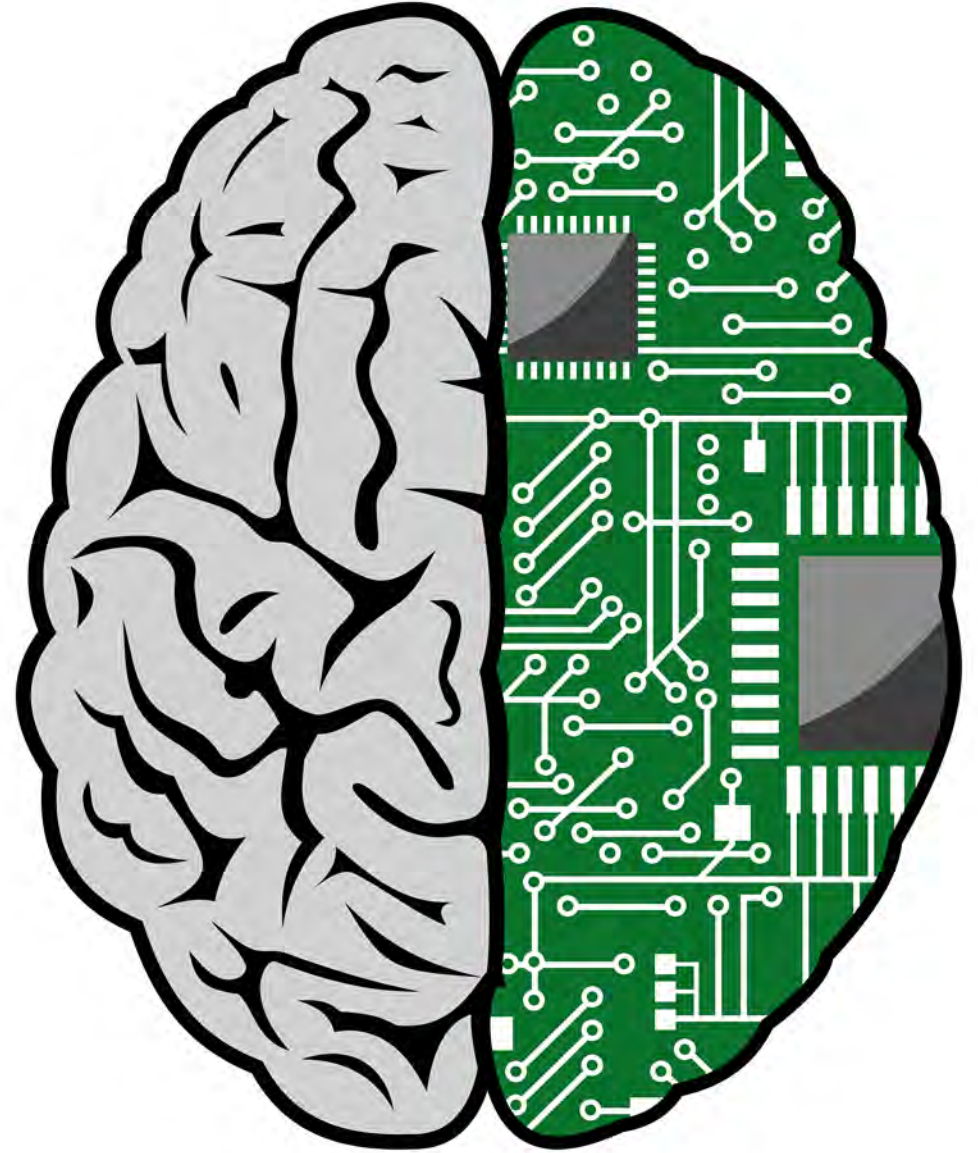
Free Password Keeper

- [Keepass.info](http://keepass.info)



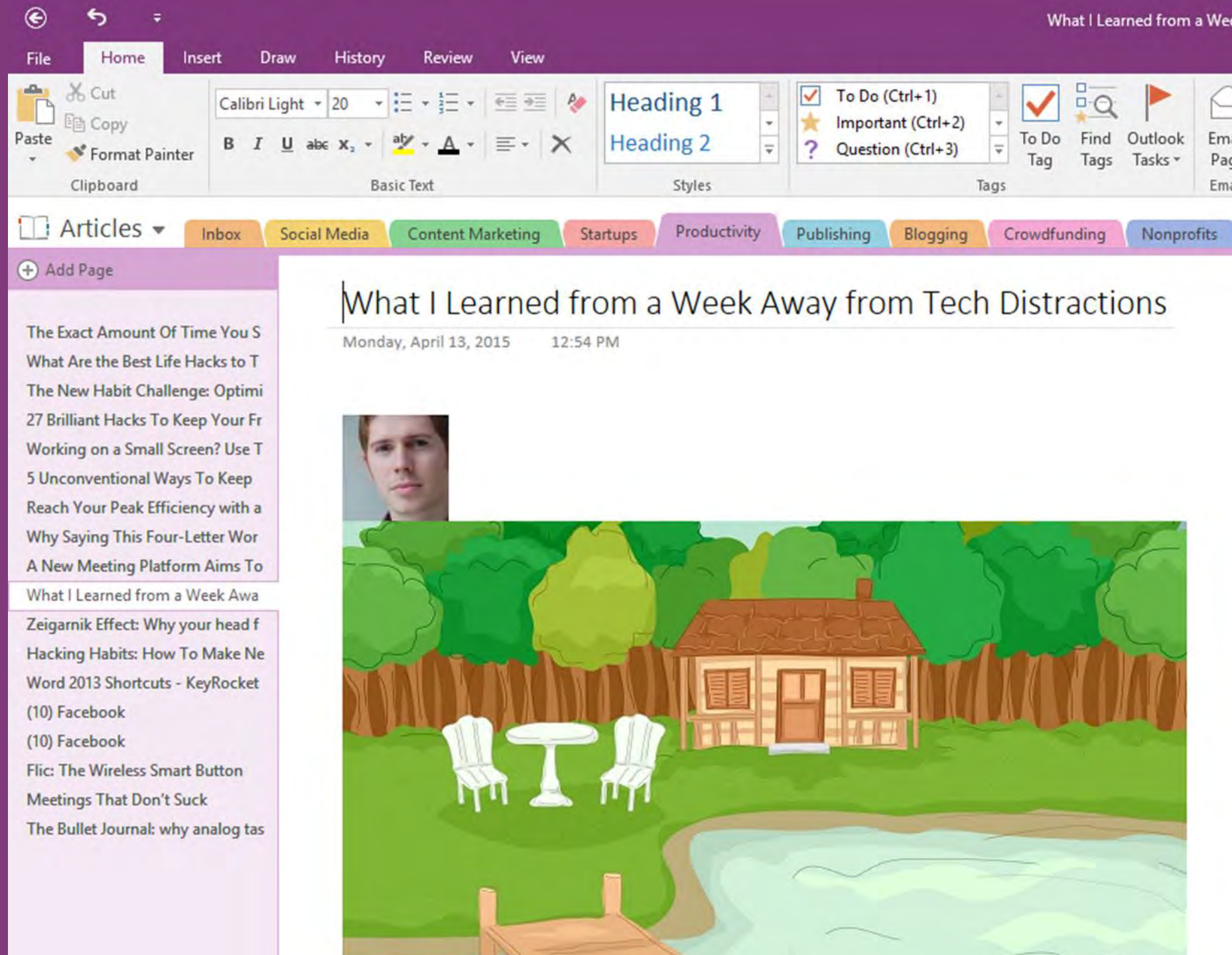
Knowledge System Benefits

- Gets it all out of your head
- Gives you “buckets” to hold things
- Lets you clip and save from the web
- Searchable, organizable
- Lets you access your knowledge from anywhere
- Your auxiliary brain



Free Knowledge System

- Microsoft One Note



The Power of Checklists



The Checklist Manifesto

- Pilots – allows them to fly increasingly complex aircraft
- Surgical Teams – 90 second checklist reduced death by 1/3



Garland is the Checklist King!



- Not a pilot but I use a wide range of checklists
- Proposals
- Hiring freelancers
- Travel
- Project management
- Speaking gigs
- Managing web sites
- Marketing programs
- And even my hobbies

Whenever I do Something New

- I create a checklist first



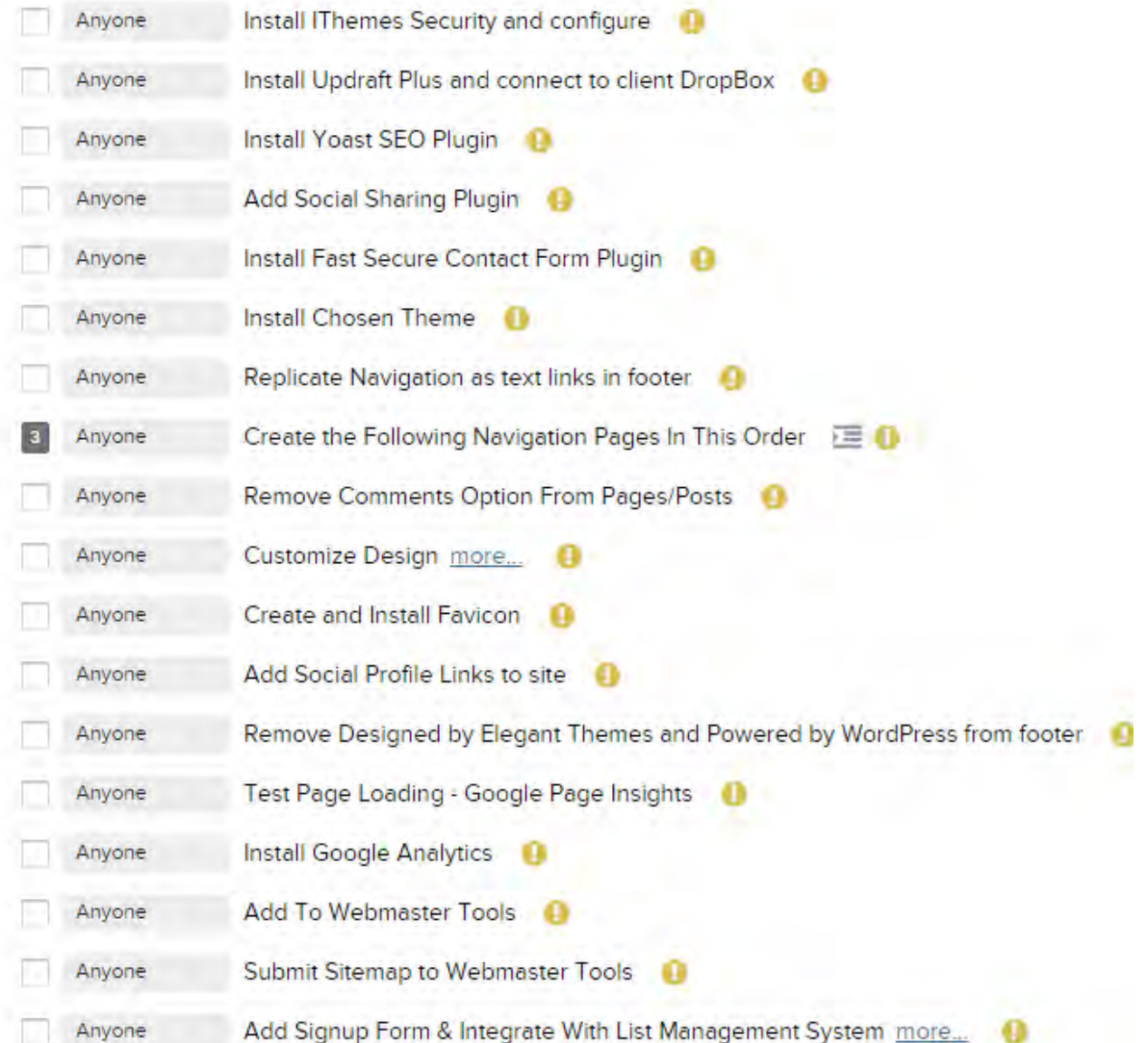
Reasons I Use Checklists

- Keeps me focused
- Never miss a step
- Eliminates mistakes
- Helps me train others
- Automation
- Saves me time



Where to Create Checklists

- OneNote
 - Cross platform
 - Access from any device
 - Shareable with others
- Task management system (Teamwork or Trello)
 - Delegable to others
 - Task “themes” let me create task lists with hundreds of subtasks in seconds
 - Easy to delegate



Checklists are Living Documents

- I continually update the checklist every time I use them as I think of new things to add



“REDUCING DISTRACTIONS”

—— To Get More Done ——



Distractions
CRIPPLE
Productivity

WHY REDUCE DISTRACTIONS?

- EVERY interruption breaks focus
- It can take 20-30 minutes or longer to get back to the same level of productive thinking after EACH distraction
- So if you are distracted many times every hour, you are only working at a *fraction of your potential!*



MULTITASKING

Because we needed another word for "unable to focus on the task at hand"



Multitasking is a Myth

- Multitasking is just jumping from task to task with short bits of focus on each
- Studies prove we work better when we fully focus

A close-up photograph of a hand typing on a white computer keyboard. The image is heavily overlaid with a semi-transparent purple color, which serves as a background for the text. The lighting is soft, and the focus is on the hand and the keys.

REDUCING EMAIL DISTRACTIONS

THE PROBLEM WITH EMAIL



Steady stream of email arrives and each time we get a notification



It is human nature to want to check in case it is something important or urgent



So every few minutes, we break our "world class focus" and check only to find the email was probably just a newsletter or junk mail

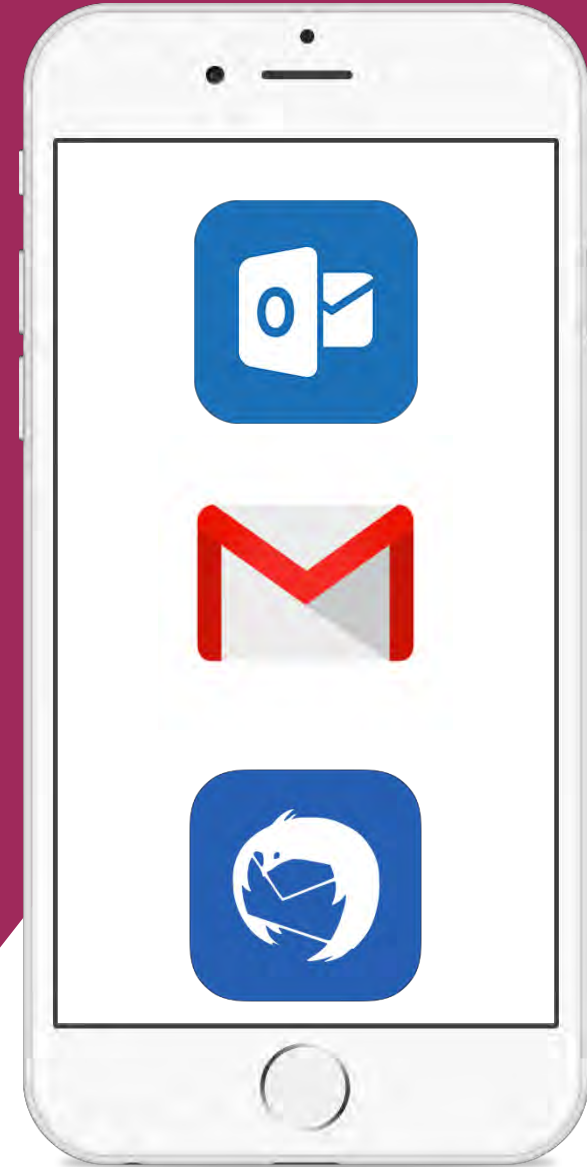
A BETTER APPROACH



- Set a target time for replying to emails (I choose 1 business day)
- Turn automatic checking of emails off
- Turn ALL email notifications off (Outlook is particularly insidious for this)
- Check email 1-2 times per day at set times and deal with all of it then – even if just to reply that you will look into it and get back to them shortly

DON'T KEEP EMAIL OPEN

- Don't keep your email program such as Outlook or Thunderbird open while working unless that is part of the project
- If using webmail like Gmail, don't have an open email tab





EMAIL ALL TAKEN CARE OF

Remember, your email still all gets dealt with
– but by using a focused block of time
instead of piecemeal throughout the day

PHONE DISTRACTIONS



Have a set block of time for making outgoing calls or for people to call



Set peak focus times, perhaps 1 hour per day, where your calls goes to a colleague or voice mail



Schedule phone appointments to reduce interruptions



Use alternate non-interruptive ways to communicate such as email and other messaging apps

MOBILE



Mobile phones add a second phone ringing PLUS notifications, emails, etc.



Turn cell phone off or set to airplane mode during peak focus times and check it during your breaks



Dump notifications on email, Facebook and other apps that are not critical

COMPUTER APPS, PROGRAMS AND TABS

- Turn off all other programs that notify you like Skype, Slack, Outlook, and others
- Close all programs you aren't currently using for the task at hand
- Close all browser tabs that aren't currently needed for the task at hand



COWORKERS

Co-workers interrupt us constantly. Here are some tips:

- Sit with your back to your door
- Don't make eye contact
- Wear a headset
- Put up a "Do Not Disturb" sign during peak focus
- If personal, say you will talk to them about it at lunch or coffee
- If they need help, say you are tied up in a time sensitive task and can help them later - book a time



STAFF

If your staff constantly interrupt you:



Make sure they go to their own supervisor first



Set a 20 minute meeting with each direct report to go through everything on both your lists with no interruptions in between other than emergencies



Encourage them to ask questions via email so you can handle them as a batch



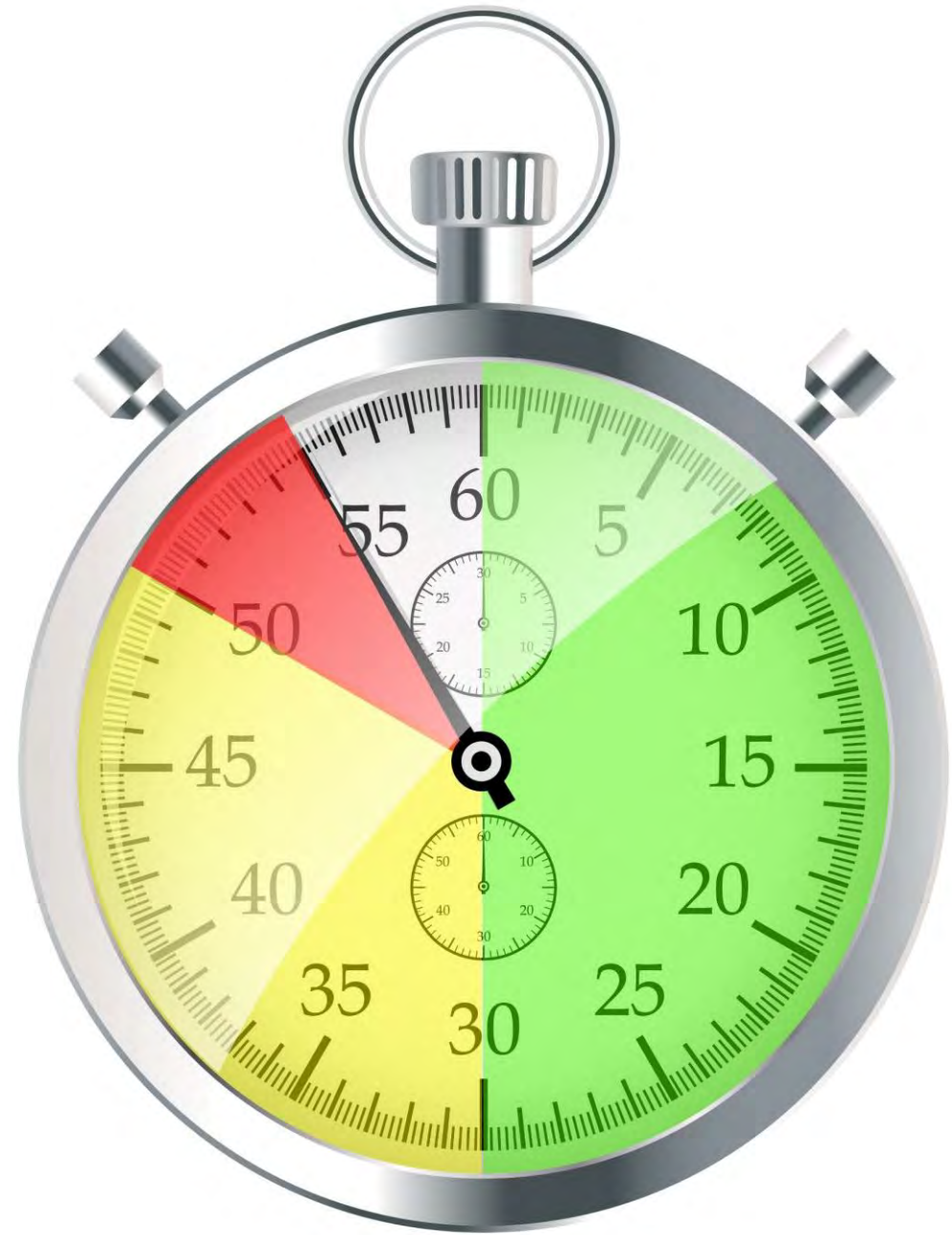
Handle updates through a task management system

INTRODUCING "THE POWER HOUR"



What Is A Power Hour?

- 1 hour of UNINTERRUPTED focus on your HIGHEST priority project



Why Is It Useful?



- Helps you get to critical projects that you never seem to get time for
- The lack of interruptions helps you focus and work at a much higher level than the rest of the day

How to Set It Up

1. Schedule It
2. Advise Your Team
3. Define “Emergencies”
4. Choose Your Target Project
5. Hold ALL Calls
6. Turn OFF Your Business Phone
7. Turn OFF Your Mobile
8. Close ALL Apps, Programs, Tabs & Notifications
9. Clear Your Desk
10. Do Not Disturb Sign
11. Set a Countdown Timer for 1 Hour
12. Choose Highest Priority Project
13. Work



Schedule It

- Set aside time so you have it available
- Keep this time “sacred”



Advise Your Team

- So they know you are unavailable
- So they support you in this



Define “Emergencies”

- Largest donor about to walk
- Building on fire



Hold ALL Calls



Turn OFF Your Business Phone



Turn OFF Your Mobile



Close ALL
Apps,
Programs,
Tabs &
Notifications



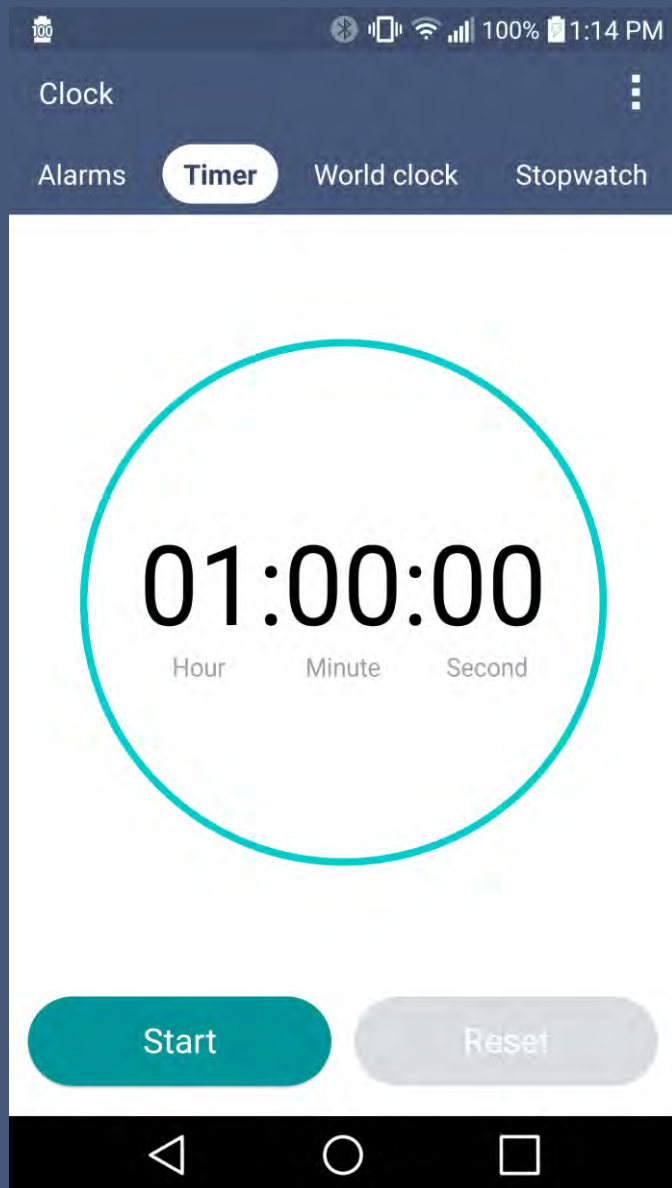
A home office with light blue walls and a white door. On the left is a dark wood bookshelf filled with books and binders. In the center are two white filing cabinets with glass tops, cluttered with papers and folders. To the right is a white L-shaped desk with a laptop, a desk lamp, a telephone, and other items. A window with blue blinds and a bamboo valance is above the desk. A striped rug is on the floor.

Clear Your Desk

Choose Your Target Project

- Highest priority project
- One you have difficulty getting time to work on





Set a Countdown Timer for 1 Hour

Work for 1 Hour

- ONLY open programs or browser tabs for the project
- Work ONLY on the project you have chosen

What If I Can't Avoid Interruptions At Work?

- Consider changing locations
- Library or coffee shop





Power Hour Frequency

- Try for once per day or at least twice per week

Implement it Office Wide

- Create an Office-wide “Power Hour” or “Focus Hour” where everyone in the office gets an uninterrupted hour

Time Blocking



Time Blocks by Roles

- Roles like
 - Community Relations
 - Human Resources
 - Program Development
 - Program Delivery
 - Fundraising & Grant Proposals
 - Volunteer Recruitment
- Higher percentage based on priority



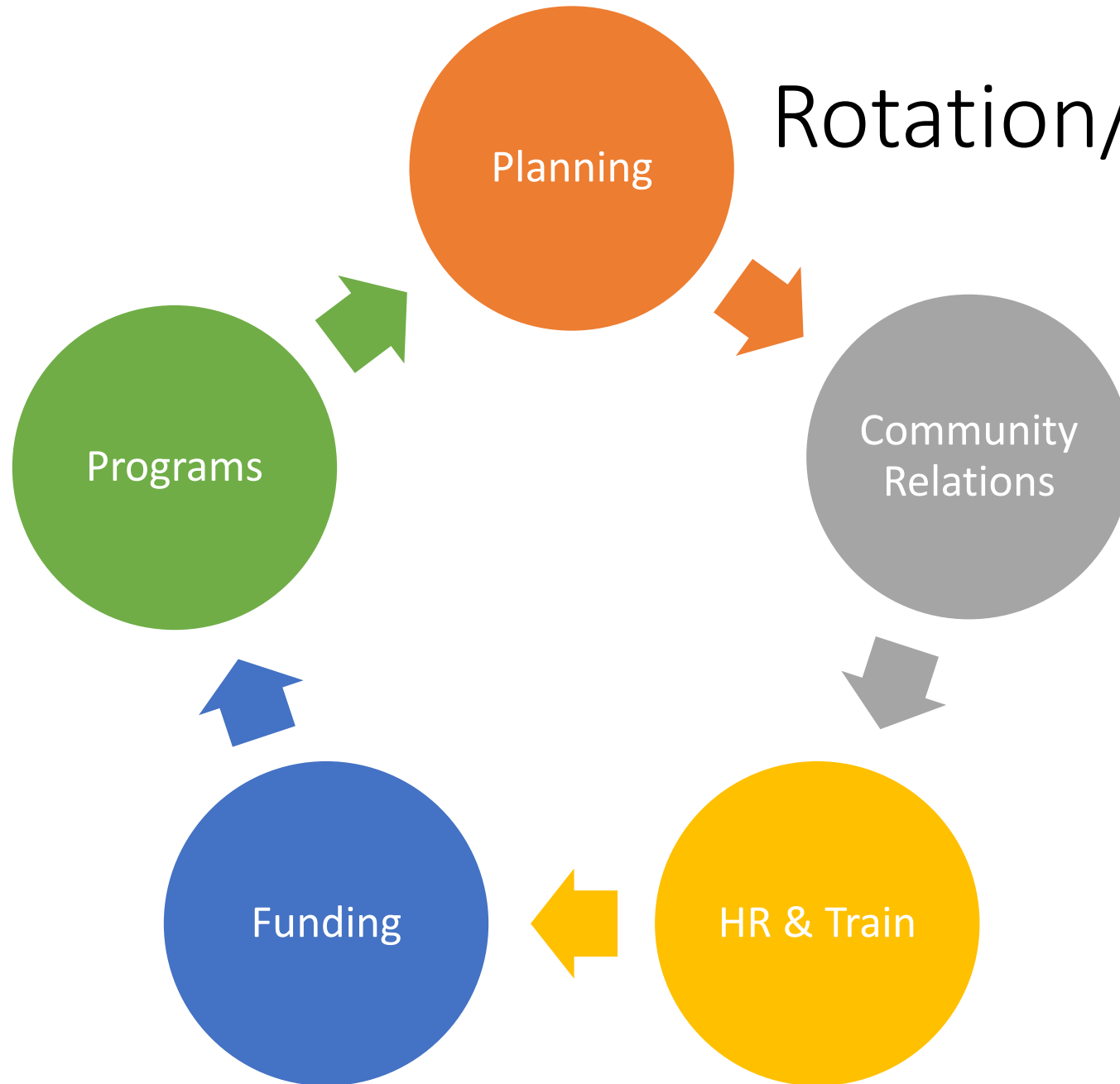
Calendar/Agenda Method

	Mon	Tues	Wed	Thu	Fri
Morning	Program Development	Funding	Program Management	Funding	Admin
Afternoon	Community Relations	Human Resources & Training	Volunteer Recruitment	Professional Development	Planning

Laser Focus Days

Mon	Tues	Wed	Thurs	Fri
Admin	Community Relations	Funding	Programs	Human Resources

Rotation/Carousel Method



- Rotate through each category, setting time for each
- Control % spent by setting timer for longer periods on higher priorities

Analyzing Tasks

00:04:08 Avg. Time on Site

8.30% % New Visits



	Pageviews	% Pageviews
	5,932	23.33%
	1,306	5.14%
	867	3.41%
	697	2.74%
	692	2.72%

Pageviews	% Pageviews
5,932	23.33%
1,306	5.14%
867	3.41%
697	2.74%
692	2.72%

Bounce
43.64%

Site Avg
43.64%

New Visits

27.27

85.1

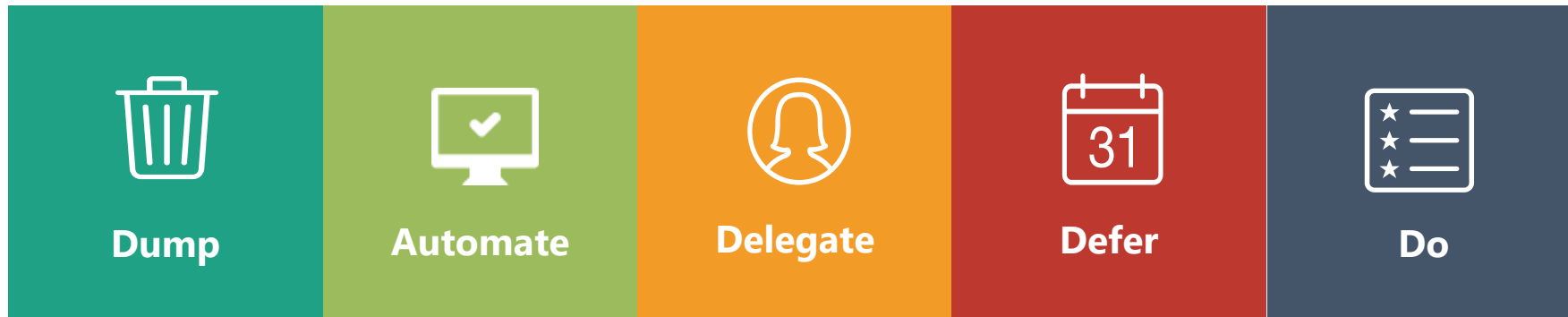
56.

35

Google Analytics

Review Tasks

Apply These Factors IN ORDER

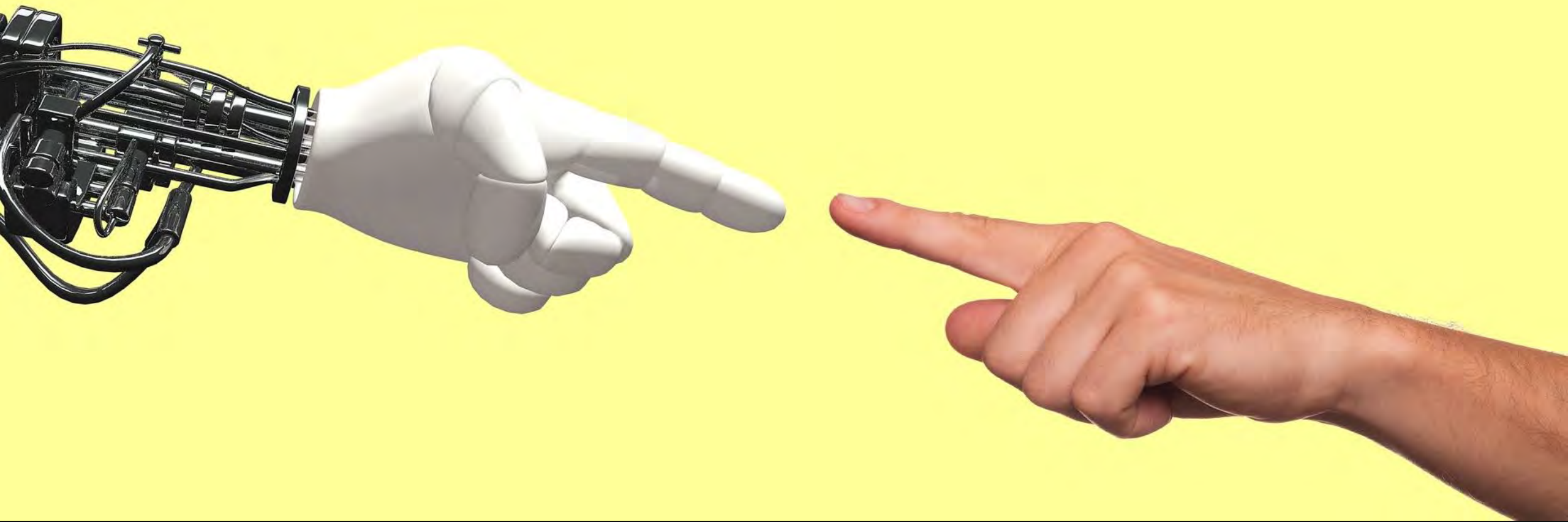


Only “Do” the task if you can’t dump, automate, delegate or defer it



DUMP

- Does the task bring you closer to your goals?
- If you don't do it, what is the result?
- Watch for “legacy” tasks



Getting Started With
Automating Tasks



STEP 1: IDENTIFY TASKS FOR POSSIBLE AUTOMATION

- ▶ Track what tasks you do every day
- ▶ Ask yourself, could this be automated?
- ▶ Tag these tasks or make a list
- ▶ Pick a simple task to start

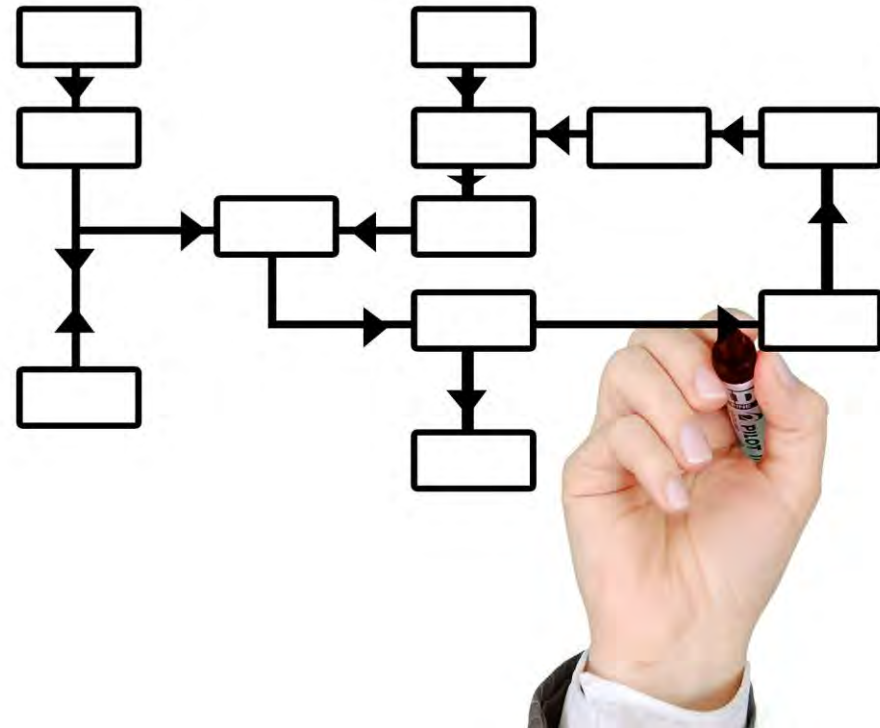
Step 2: Check Your Software

- ▶ Your software may already have automation built in
- ▶ Gmail – canned replies
- ▶ Excel and Word – macros
- ▶ Email list management programs – automations and auto responders
- ▶ Check the software forum
- ▶ Put in a support ticket



Step 3: Borrow Work of Others

- Search online to see if someone already has an automated solution
- Check Zapier



Text Expanders



Text Expanders

- Let you insert blocks of text, urls, etc. with just a few keystrokes or a keyboard shortcut

Save Time With Text Expanders

Turn a Few Keystrokes

aboutG |

Into a Sales Letter

Why choose time management speaker, Garland Coulson (Captain Time) for your next conference or event?

When you choose Captain Time, you give your participants something more valuable than money – you give them time! Time is more valuable than money. If you run short of money, there are always ways to get more. But if you run out of time...that's it!

Memorable, Powerful, Useful

Garland's presentations are powerful, yet understandable for everyone. People go away with techniques and tools they can use everyday, not "ivory tower" concepts. Garland's passion and power are mixed with light-hearted humour to create a memorable presentation that will impact your attendees for years to come.

Uses for Text Expanders

- Sales letters
- Signature lines
- Support replies
- Common email replies
- Fundraising letters
- URLs
- Recommendations of tools, sites and software
- Picture links
- Favourite recipes
- Automatically correcting misspelled words
- Common bits of text
- Programmers – code modules
- Email addresses
- Phone numbers
- Mailing addresses
- Common symbols/characters
- Insert date/time
- Templates & checklists

Free Text Expander

- Windows/Android
 - PhraseExpress

Delegate



- Does the task HAVE to be done by you?
- Can it be done by others in the organization – staff or volunteers?
- Can it be outsourced to others outside the organization such as a virtual assistant, writer or web/graphic designer?



Defer

Does the task need to be done today or can it be scheduled for later?

Do

- “Do” is the last resort
- ONLY if you can't
 - Dump
 - Automate
 - Delegate
 - Defer
- ONLY when the task is:
 - Critical to your desired outcomes
 - Highest priority





Make Analyzing Tasks A Habit

- Analyze each task before you start work on your next task

Summary

- Take control of your time
- Treat your time as valuable
- Have systems for
 - Task management
 - Appointments
 - Contact info
 - Notes & Passwords
 - Checklists
- Set time blocks for key roles
- Reduce distractions
- Create “Power Hours”
- Analyze tasks
 - Dump
 - Automate
 - Delegate
 - Defer
 - Work towards key outcomes

MORE HELP?

Visit
[CAPTAINTIME.COM](https://captaintime.com)

