

Organize Yourself

Application Packet



Climb One: Lead Self



Organize

Organize Yourself

Action Assignment



Peter Drucker, the well known management writer stated that leadership is doing the right things and management is doing things right. Organizing yourself enables you to do both. To have the time and energy you need to do the right things, and to do them well, you need to be organized. Organization is a discipline.

There are three key types of discipline that are fundamental to getting and staying organized. They are:

1. Organize your WORKFLOW.

We all have workflow processes within our own jobs. A workflow process is simply a series of steps or activities that produce a product or service. What workflow processes are most essential to your role as a leader?

2. Organize your WORKSPACE.

Your workspace has a big influence on your ability to get things done effectively and efficiently. It either helps or hinders your workflow processes. Is your workspace an accurate reflection of you as a leader? Does it indicate that you have taken the time to create and organize an environment that is conducive to achieving optimal results?

3. Organize your TIME.

Time is one of your most valuable resources. Learning to make the most of your time is critical to doing the right things and to do them well. Good leaders recognize this and therefore make a commitment to becoming astute time managers.

This action assignment will help you apply practical tools for organizing yourself, your workflow, your workspace, and your time.

Let's get started on this action assignment!



Assess

Assess How Well Organized You Are

part 1

Take a moment to assess how well you are organized when it comes to your workflow processes, your workspace, and your time. Then, identify at least one thing you can do to improve your organization in one of those three areas.

Use the worksheet on the following page to determine how well organized you are when it comes to your workflow processes, your workspace, and your time.

1. Rate how well organized you feel you currently are in each of the three areas - workflow, workspace, and time.
2. For each of the three areas, identify at least one thing you would like to do to improve.
3. You may want to gain insight from trusted associates on each of the three areas. Be prepared to discuss these things with your coach.
4. Keep the worksheet for your reference.



How organized am I as a leader?

Assess

Personal Organization

Assessment

How organized am I?

My Workflow

I would rate my workflow processes as:

- H** HIGHLY ORGANIZED: My workflow processes are clear and very effective.
- M** SOMEWHAT ORGANIZED: My workflow processes are okay but could be better.
- L** POORLY ORGANIZED: My workflow processes are in bad shape and need major help.

What is one WORKFLOW process, that if I were to improve it, would bring increased results and better satisfaction to my role as a leader?

My Workspace

I would rate my workspace as:

- H** HIGHLY ORGANIZED: My workspace is designed well and very conducive to my work.
- M** SOMEWHAT ORGANIZED: My workspace is okay but could be better.
- L** POORLY ORGANIZED: My workspace is in bad shape and needs major help.

What is one specific improvement that I can make to my WORKSPACE that would dramatically increase my results and my satisfaction as a leader?

My Time

I would rate my time management as:

- H** HIGHLY ORGANIZED: I do an excellent job of planning and utilizing my time.
- M** SOMEWHAT ORGANIZED: I do okay at planning and utilizing my time, but I could do better.
- L** POORLY ORGANIZED: I need major help in planning and utilizing my time.

What is one specific improvement that I can make to how I manage my TIME that would dramatically increase my results and my satisfaction as a leader?

Workflow

part 2

Organize Your Workflow

Identify and define a specific workflow process that is important to you. Analyze it to pinpoint practical ways in which the process can be improved. Then actually implement the improvements.

Use the worksheet on the following page as a template to guide you as you analyze and improve a specific work process within your area of responsibility.

1. Select and define a critical work process. Create a CURRENT STATE diagram of the process as it actually is currently.
2. Analyze the workflow diagram and identify improvements that you can make right away. Then, use another copy of the Workflow Worksheet to create a FUTURE STATE diagram. That diagram should show how the process will work once you implement the improvements.
3. Create an action plan of the improvements you intend to make.
4. Keep the worksheet for your reference. Share your work with your coach.



Are my workflow processes organized and efficient?

Workflow Organization

Worksheet

Workflow Worksheet

Workflow Process Name:

Current State

Future State

Key Inputs

Key Outputs

Workflow Process Map



Reference



Activity,
Step, Task



Decision



Document



Transport



Directional Flow



Delay, Wait

Workspace

part 3

Organize Your Workspace

Take time to analyze your current workspace to determine how conducive it is to your most important workflow and effectiveness as a leader. Pinpoint practical ways in which your workspace can be improved. Then actually implement the improvements.

Your workspace has a big influence on your ability to get things done effectively and efficiently. It either helps or hinders your work processes. And it either enhances or detracts from your credibility as a leader.

Use the worksheet on the following page as a template to guide you as you analyze and improve your workspace.

1. Create a CURRENT STATE diagram of the workspace as it actually is right now. Identify key issues or obstacles that are hindering your work effectiveness.
2. Identify a few critical improvements that you can make to your workspace. You may want to use the 5S process to help you (see the 5S Tool).
3. Take 'BEFORE" and "AFTER" photos of your workspace to document the improvements and share your best practices.
4. Keep the worksheet for your reference. Share your work with your coach.



Is my workspace organized and conducive to my role as leader?

Workspace Organization

Worksheet

Workspace Worksheet

Workspace Name:

Current Space

Future Space

Key Issues / Obstacles

Improvement Ideas

Workspace Map or Diagram

Organize Your Time

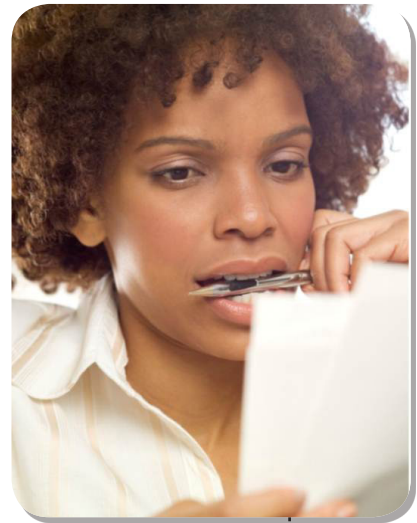
Take time to analyze how you currently manage your time. Pinpoint practical ways in which you can use your time more effectively. Then actually implement the improvements.

Learning to make the most of your time is critical to your ability to do the right things and to do them well as a leader.

Planning your time really means planning your tasks and activities so that you have the best chance to achieve what matters most in the timeframe you have to work with. If you fail to plan, you should plan to fail.

Use the worksheet on the following page as a guide to help you analyze and improve the way you manage your time.

1. Make a separate copy of the worksheet for each day you plan to analyze your time (five to ten days are recommended).
2. Make a list of your top five priorities - the things that matter most to you in your role as a leader.
3. For each day, record precisely what you do, how you spend your time, in 30 minute blocks.
4. Look over each day and assess how much time is devoted to each of your top five priorities and how much time is spent on things that are not that important.
5. Identify inefficiencies in your daily schedule and opportunities to improve your time management.



Am I using my time as effectively as I should?

Time Time Organization

Worksheet

Time Analysis

Date: _____

Goal for the Day

Key Concerns

My Top Priorities

1 _____

2 _____

3 _____

4 _____

5 _____

How Could I Have
Better Managed this Day?

My Daily Schedule - Actions and Tasks

Notes

My Notes and Ideas

Five Climbs Support

Five Climbs is provided by
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888.823.1646
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