



UNBOXED TRAINING SOLUTIONS

A New Generation of Training



I'D SURE HATE TO BREAK DOWN HERE:

PROJECT PRIORITIZATION

LEARNING OBJECTIVES



Identify your major projects.



Simplify projects through task management.



Develop a plan for tackling tasks.



Use a tool to prioritize current projects.

WHAT MAKES ME QUALIFIED?

- **Procrastinator, by nature**
- 20+ years of training and development experience
- Master's in Teaching, Learning and Leadership
- **Terrible at Time Management**
- Trained and certified through the The Ohio State University
- Trained and certified through San Diego State University in Hospitality and Lodging Management
- **Innate extrovert – everything is well organized – in my head**
- OkACTE New Professional of the Year
- Finalist, American Hotel and Lodging Association Teacher of the Year
- **The worst students can sometimes make the best teachers!**

SAGE ADVICE



Knowledge is knowing a tomato is a fruit.

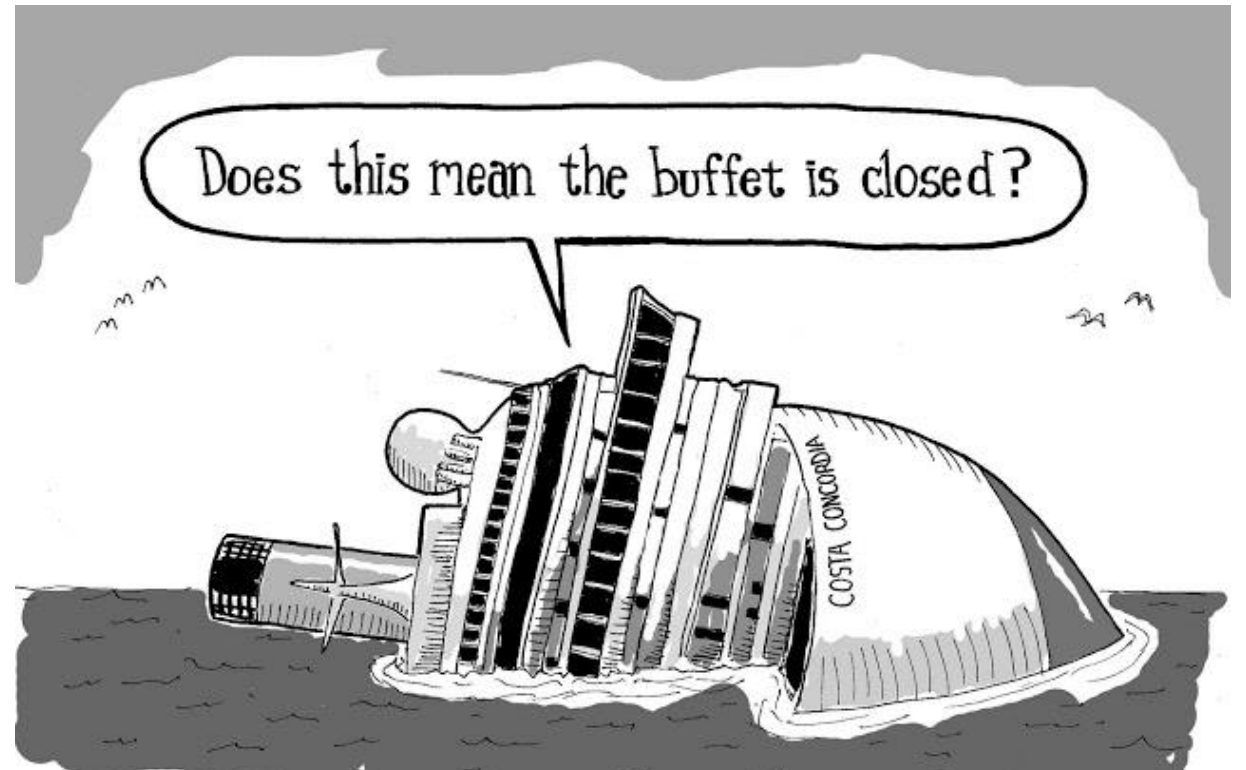
Wisdom is not putting it in a fruit salad.

Philosophy is wondering if that means ketchup is a smoothie.

THAT'S CONVINCING, JACK.

- This is about:

- Maximizing time
- Gaining perspective
- Focusing on the right things
- Simplifying processes
- Performing better
- Not burning out
- Learning strategy





ONE BITE AT
A TIME!

LIST ALL OF YOUR MAJOR PROJECTS

Projects not *tasks*.

Project	Task
More complex.	Simple.
Usually takes time to finish.	Complete in one setting.
Multiple “steps” involved.	One “step” involved.
Example: complete a report.	Example: return a phone call.
Example: coordinate a staff meeting.	Example: send an email.



GOAL SETTING, PRIORITIZATION, & TASK ALIGNMENT WORKSHEET

Set three to five goals per quarter. Make sure every daily task you are spending time on matches your quarterly goals. If it doesn't – don't spend quality time on it!

GOAL	PRIORITIZATION LEVEL	STRATEGIES TO ACHIEVE	TASKS	NOTES
Example: Q1.G1. Increase client retention by 3% by December 31.	High	<ul style="list-style-type: none"> Improve client relations. Contact every client. Discuss hard topics. 	<ul style="list-style-type: none"> Email or call at least 3 clients per week. Schedule or drop in to visit one difficult client per week. Prepare a list of difficult questions to determine why clients are leaving. 	

GOAL SETTING, PRIORITIZATION & TASK ALIGNMENT WORKSHEET

USE A SIMPLE RISK ANALYSIS

1. What will this cost in time, money, and other resources?
2. Is anyone else doing it?
3. What will happen if we don't do it?

A-B-C'S OF TASK MANAGEMENT

A Urgent - Must complete today

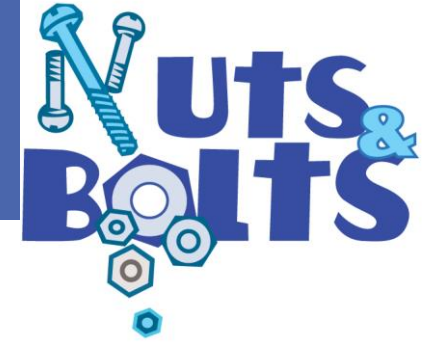
B Important - Must complete this week

C Radar - Must complete in the future

- (A1) Check over notes for presentation
- (A2) Write & schedule newsletter
- (A3) Research next blog post
- (B1) Schedule a meeting with accountant
- (B2) Shirts dry-cleaned
- (B3) Buy milk
- (B4) Meet with Betty
- (C1) Clean garage

IDEAS TO REMEMBER

- Never do anything more than **3 times**.
- Based on Pareto's Principle, 80% of your paycheck is for the top 20% of your priorities.
- Identify where stress is coming from. Eliminate (at the very least, reduce) it.



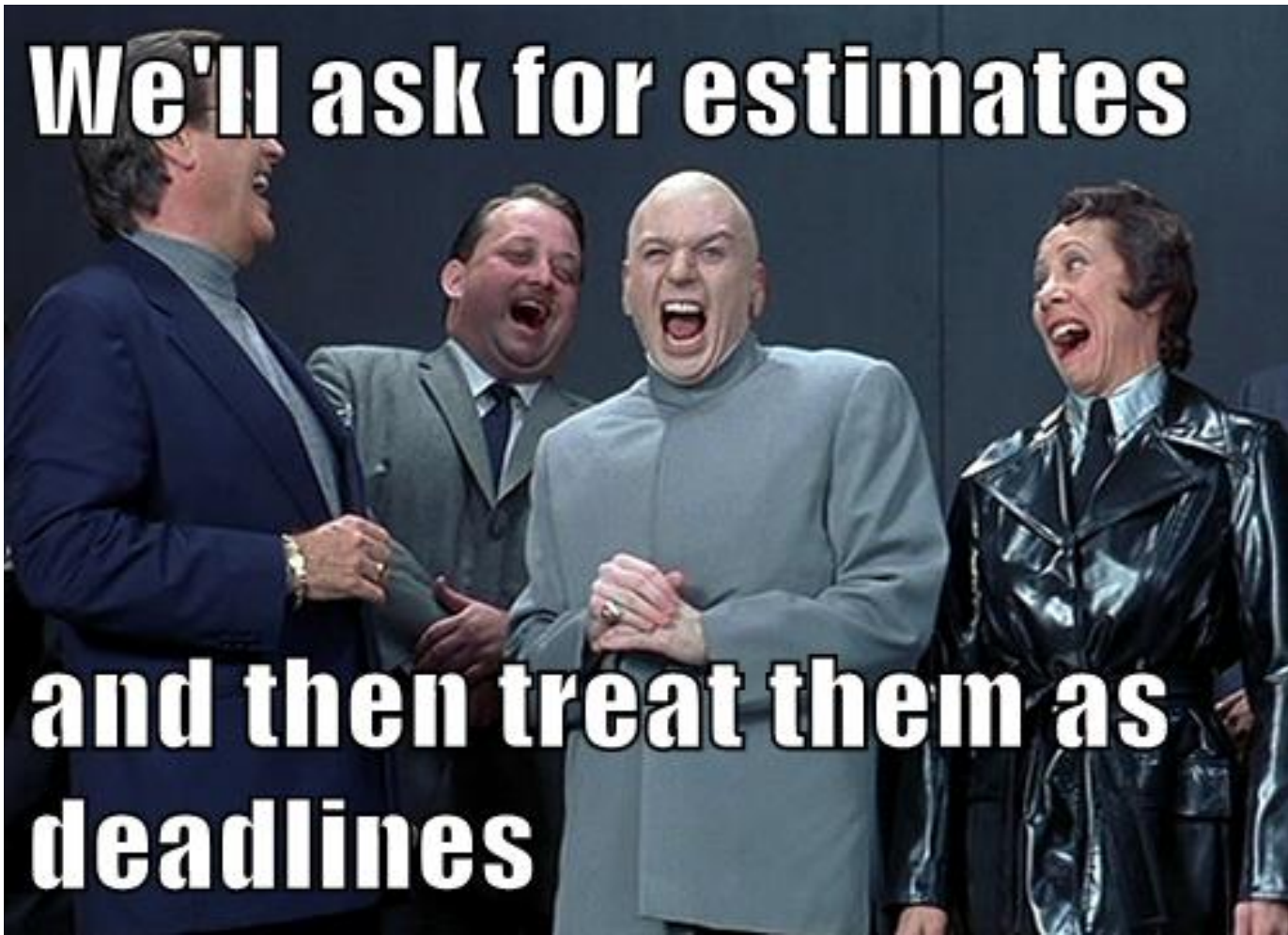
A	Projects/Tasks	
	Expertise	24 hours
	Churn	
B		24-48 hours
C	25% of C trashed weekly	+48 hours



Delegate as much as possible,
as soon as possible
**remember you're not getting paid for it!*

USING A 2X2 PRIORITIZATION MATRIX

High Impact	Quick wins Activities that give the best return based on the effort. They are valuable and fundamental to your success. Focus on actions in this quadrant and complete them before anything else.	Major projects Activities that provide long term returns but may be more complex to execute. Be selective and only pursue them if they are likely to be worth the effort. Plan and execute efficiently.
Low Impact	Fill ins Unimportant activities including everyday tasks. Don't worry about these activities. Keep them on the back burner and complete them when there is excess capacity.	Time wasters These activities are time-consuming and require resources that are better spent on other things. They are generally not worth completing so avoid, delegate, or defer them. DELAY IGNORE
	Low Effort	High Effort



Top Tasks for Today	Can you bump?
1.	
2.	
3.	
4.	
Daily Task Steps	Best (not earliest) Times
Call	
Write	
Analyze	
Meet	

DAILY ACTION PLAN

- “You always have time for the things you put first.”
- “You cannot be everything to everyone. If you decide to go North, you can’t go South at the same time.”
-Jeroen De Flander
- “The key is not to prioritize what’s on your schedule, but to schedule your priorities.”
-Steven Covey



EAT THAT FROG!

Tackle the...

- worst,
 - most unenjoyable,
 - most dreaded,
- task or project **FIRST!**

It can't be worse than eating a live frog!



OUR BRAINS WORK DIFFERENTLY

Left	Right
Process improvement	Communication
Logic	Movement
Mini-computer	Color and sound



Frontal lobe controls perception:

65% of women follow “hunch” first

75% of men problem solve first

WEEKLY MEETING WITH YOURSELF

COMMITMENT TO MISSION AND VALUES

- Reflect on your personal mission
- Reflect on your core values
- Review your behaviors and actions – do they align to your mission and values?
- Recommit to integrating your mission and values in your decisions and actions. How can you improve?

GET ORGANIZED!

- Review strategic plan/action plan
- Review current projects, tasks, assignments, and action plans
- Gather all to-do lists
- Review calendar
- Review any other tools (2x2, etc.)
- Prioritize

SCHEDULE YOUR WEEK

- Schedule what must be done first
- Allow appropriate time to prepare for meetings
- Avoid scheduling tasks that require high focus on heavy meeting days
- Review how much time is left for “filler (low priority) activities”
- Share your calendar with an assistant, or staff who can help you stick to your schedule
- Remember, things are going to happen that require a shift in scheduling – so plan for it in advance!
- Don't book yourself completely up or you'll have to make decisions on what falls through the cracks. Avoid setting yourself up for failure

PRACTICE SCHEDULING

Review the schedule for Loyd Lightfoot, Director of Operations, for Unboxed Training Solutions. Critique his daily calendar, offer ideas for improvement, recognize necessary vs. unnecessary interruptions, note problems, and make suggestions.

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