

# TIME MANAGEMENT



## MASTERY

Stress-free  
Productivity  
in the 7 Key  
Areas of Life

JOEL GARFINKLE

# **TIME MANAGEMENT MASTERY**

**STRESS-FREE PRODUCTIVITY  
IN THE  
7 KEY AREAS OF LIFE**  
(**TIME, PROJECTS, PEOPLE, SCHEDULES, INFORMATION,  
WORK-LIFE BALANCE & ABUNDANCE**)

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*I am definitely going to take a course on time management...just as soon as I can work it into my schedule.*

~ Louis E. Boone

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*Time is the scarcest resource  
of the manager; if it is not  
managed, nothing else can  
be managed.*

~ Peter F. Drucker

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## INTRODUCTION

### Purpose of this book

MODERN life is complex and often unpredictable. Your dreams and plans can be derailed almost as soon as you set your mind to them. And all your good intentions can go out the window with the first emergency that lands in your lap. I hear it all the time from many of my coaching clients. They want a way to get things under control so that they can accomplish their goals with less stress and finally realize their dreams. If you're reading this book, you probably want the same thing.

Of course, you can't control everything around you and it would be a waste of time to try. You can, however, take steps to manage the seven key areas that influence your effectiveness in getting what you want in life: time, schedules, projects, information, people, abundance, and your work/life balance. We'll address all of those things here.

### How to use this book

This book was created not just to provide suggestions and information to be absorbed for possible use in the future, but as a workbook to be utilized as a springboard for your quick success. Each section includes the following items:

1. Introduction and explanation
2. One or more exercises pertaining to the section's topic
3. Balance Builder
4. Action Steps

### Exercises

While it may be tempting to glance at the table of contents and pick one or two areas that seem the most interesting or useful at this point in your life, I encourage you work through the exercises in every section. Why? Because developing just one or two areas in your life works only if (a) you choose the right areas, (b) the areas you ignore are truly working well, and (c) the areas you ignore are strong enough to handle the neglect while you focus on the areas you chose. You might also discover that some of the areas you thought were under control really aren't.

*Time equals life; therefore, waste your time and waste your life, or master your time and master your life.*

~ Alan Lakein

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You can't control everything around you, but you can manage the areas that influence your ability to create the life you want.

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## **Balance Builders**

Balance Builders are a set of daily exercises designed to be completed over a week's time, from Monday through Friday, with the exception of Balance Builder #10, which spans a full seven days. As the name implies, Balance Builders will help you develop a healthy and productive balance in all areas of your life. Although each Balance Builder is presented as a series of five daily exercises, you may complete them at your own pace and in whatever order works best for you.

## **Action Steps**

Action Steps include expanded suggestions for getting the most from each section and serve as an overview of the information and a reminder of what you have learned.

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Use the **Exercises** in each section to learn more about yourself and what you want, need, and value.

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Use **Balance Builders** to develop a healthy and productive balance.

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**Action Steps** provide expanded suggestions for getting the most from each section.

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### WHAT DO YOU REALLY WANT?

ACHIEVING anything worthwhile always begins with the desire to have it, become it, or accomplish it. So it seems logical that we would know what “it” is before we plunge in. But often we head down the wrong path, pursuing the wrong goals, because we haven’t taken the time to determine what it is that we really want.

Instead, we substitute what other people, with the best of intentions, want for us. Or we pursue goals we believe we “should” want. Or we simply take whatever path opens before us so that we don’t have to make a decision at all. If you’ve been traveling the wrong roads, it’s time to check your destination and make sure you’re heading somewhere you really want to go.

In this section, you’ll have an opportunity to review what matters most to you and set goals that reflect those values. Then you’ll come up with an action plan.

At the end of the section you’ll find your first Balance Builder: Say yes to what you want most. Do the daily exercises for a week and you’ll be well on your way to getting what you really want.

#### **What you’ll accomplish in this section:**

- Understand what matters most to you
- Choose a destination that honors your values
- Create an action plan to take you in the right direction, one step at a time
- Make sure the big rocks fit before you add everything else
- Balance Builder #1: Say Yes to What You Most Want

*The things that one most wants to do are the things that are probably most worth doing.*

~ Winifred Holtby

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Achieving anything worthwhile begins with the desire to have it, become it, or accomplish it.

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## Values: What matters to you?

Knowing what you really want to achieve requires a clear understanding of what matters most to you. It's important to be aware of the activities, beliefs, causes, people, and possessions you value.

We're not talking about what you merely enjoy or believe you "should" like. Values reflect your core self...the real you. They are unique and highly personal.

Start uncovering your values by answering these questions:

What are five of your most cherished possessions?

- (1) .....
- (2) .....
- (3) .....
- (4) .....
- (5) .....

What would you save first if your home were on fire (and why)?

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What would you save next and why?

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Do you have a long-held dream? If so, what is it?

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*Until you value yourself, you will not value your time. Until you value your time, you will not do anything with it.*

~ M. Scott Peck

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Values reflect your core self...the real you. They are unique and highly personal.

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# What Do You Really Want? 2

What in your life is non-negotiable and why?

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If you could live wherever you wish, where would you live and why?

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The answers to these questions provide important clues, but the reasons for those answers are even more important because they lead directly to your values. As you think about the values underlying your answers, keep in mind that values can be qualities, emotions, character traits, behaviors, motivations...anything that matters deeply to you.

What values do your answers reveal? List them in the blanks below or circle them on the list that follows. The purpose of the above questions was to get you started, so feel free to add any values that pop into your mind as you study your answers even if they don't relate to the five questions.

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Accuracy	Enjoyment	Money
Achievement	Family	Nature
Acknowledgement	Friendship	Order
Adrenalin	Growth	Pets
Adventure	Hard work	Power
Athletics	Helping others	Privacy
Autonomy	Honesty	Recognition
Balance	Independence	Responsibility
Challenge	Integrity	Self control
Competition	Intelligence	Serenity
Cooperation	Knowledge	Solitude
Creativity	Leadership	Stability
Education	Love	Truth
Efficiency	Loyalty	Wisdom

*Happiness is that state of consciousness which proceeds from the achievement of one's values.*  
~ Ayn Rand

Values can be qualities, emotions, character traits, behaviors, motivations ... anything that matters deeply to you.

## Goals: Choosing a Destination

People who say they have trouble setting goals are usually looking too close to the present moment and creating a list of current wants and needs rather than value-based goals. Instead, project yourself into the distant future. Imagine that you've reached the last year of your life and have accomplished everything you've ever wanted.

**Action:** Now list those achievements. It might help to group them into various categories. Below are 10 categories to get you started. Add other categories that reflect you, as well. Phrase each achievement as a goal.

1. Career

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2. Relationships

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3. Learning

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4. Financial

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5. Creativity

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*More men fail through lack of purpose than lack of talent.*

~ Billy Sunday

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Imagine that you've reached the end of your life and have accomplished everything you've ever wanted.

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6. Health

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7. Adventure

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8. Service

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9. Recognition

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10. Leadership

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11. Add category \_\_\_\_\_

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12. Add category \_\_\_\_\_

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*If you want to make good use  
of your time, you've got to  
know what's most important  
and then give it all you've  
got.*

~ Lee Iacocca

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Your top goals should be  
closely aligned with your  
most important values.

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Once your list is complete, at least for the moment, evaluate how well each goal fits with your values. You might decide to cross off a few goals that aren't a good match or table them for now.

*Obstacles are those frightful things you see when you take your eyes off your goal.*

~ Henry Ford

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Your next job is to narrow the list down to five goals. Don't worry. You can always pick up the other goals later.

To select five long-term goals, prioritize your goal list in terms of importance. There are many ways to do this, but the easiest is to give each goal a grade (A, B, C, etc.). If you end up with more than five "A's," you'll have to find a way to differentiate them, such as the level of satisfaction you'll enjoy on the way to accomplishing each goal. Be creative.

**Action:** Your Top Five Goals:

1. -----  
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2. -----  
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3. -----  
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4. -----  
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5. -----  
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## Action Plan: One step at a time

Some long-range goals require years to complete, while others can be accomplished quickly. But every goal should be broken into the steps that will lead to completion. The collection of steps necessary to achieve each goal becomes your action plan. You'll develop a separate action plan for each of the five goals on your list.

**Action:** Write down your first goal. Then list each action you'll need to perform in order to reach the goal. If you get stuck, start at the end point and work your way back to the beginning step by step. It's very important to keep the actions small, specific, and achievable. Continue for each of the top five goals on your list.

*Nothing is particularly hard if you divide it into small jobs.*

~ Henry Ford

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One hour of planning will save 10 hours of doing.

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Every goal should be broken into the steps that will lead to completion.

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**Goal #1:** \_\_\_\_\_

Action 1. \_\_\_\_\_

Action 2. \_\_\_\_\_

Action 3. \_\_\_\_\_

Action 4. \_\_\_\_\_

Action 5. \_\_\_\_\_

**Goal #2:** \_\_\_\_\_

Action 1. \_\_\_\_\_

Action 2. \_\_\_\_\_

Action 3. \_\_\_\_\_

Action 4. \_\_\_\_\_

Action 5. \_\_\_\_\_

**Goal #3:** \_\_\_\_\_

Action 1. \_\_\_\_\_

Action 2. \_\_\_\_\_

Action 3. \_\_\_\_\_

Action 4. \_\_\_\_\_

Action 5. \_\_\_\_\_

**Goal #4:** \_\_\_\_\_

- Action 1. ....
- Action 2. ....
- Action 3. ....
- Action 4. ....
- Action 5. ....

*Plans are worthless, but  
planning is everything.*  
~ Dwight D. Eisenhower

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**Goal #5:** \_\_\_\_\_

- Action 1. ....
- Action 2. ....
- Action 3. ....
- Action 4. ....
- Action 5. ....

### The Big Rocks First – then everything else...

One day an expert on the subject of time management was speaking to a group of business students. As this man stood in front of the group of high-powered overachievers he said, "Okay, time for a quiz."

He then pulled out a one-gallon wide-mouthed mason jar and set it on a table in front of him. He produced about a dozen fist-sized rocks and carefully placed them, one at a time, into the jar. When the jar was filled to the top and no more rocks would fit inside, he asked, "Is this jar full?"

Everyone in the class said, "Yes."

"Really?" he asked. Reaching under the table, he pulled out a bucket of gravel and poured some gravel into the jar. He shook the jar, which caused pieces of gravel to work themselves down into the spaces between the big rocks. Then he asked the group once more, "Is the jar full?" By this time the class was onto him. "Probably not," one of them answered.

"Good!" he replied.

He reached under the table and brought out a bucket of sand. As he gradually poured that sand into the jar, it filled in all the spaces between the rocks and the gravel. Once more he asked the question, "Is this jar full?"

"No!" the class shouted. And once again he replied, "Good!"

He grabbed a pitcher of water and began to pour until the jar was filled to the brim. Then he looked up at the class and asked, "What is the point of this illustration?"

One eager beaver raised his hand and said, "The point is, no matter how full your schedule is, if you try really hard, you can always fit some more things into it!"

"No," the speaker replied. "That's not the point. The truth this illustration teaches is that if you don't put the big rocks in first, you'll never get them in at all."

*Set priorities for your goals. A major part of successful living lies in the ability to put first things first. Indeed, the reason most major goals are not achieved is that we spend our time doing second things first.*

~ Robert J. McKain

If you don't put the big rocks in first, you'll never get them in at all.

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## What Do You Really Want? 2

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The big rocks will be different for each person, but they should reflect your primary values and the goals that arise from them. If you truly want to accomplish your goals, those big rocks should be the activities that lead directly to your goals.

**Action:** What are your big rocks?

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2. -----
3. -----
4. -----
5. -----
6. -----
7. -----
8. -----
9. -----
10. -----

*Things which matter most  
must never be at the mercy of  
things that matter least.*

~ Johann Wolfgang von  
Goethe

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Your big rocks should reflect  
your primary values and the  
goals that arise from them.

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## **BALANCE BUILDER #1** **Say yes to what you most want**

Our lives are the product of the choices we make each day. We are saying "yes" to the things we choose to do, say, feel, and think. We are saying "no" to the things we elect not to do or create in our lives. Yes and no are inseparable parts of the whole of each decision. Each yes we declare by taking an action or making an agreement carries with it a shadow side, a no to something else. We say "no" even when we don't recognize it at the time.

- If you say "yes" to taking on a great but all-consuming project, your longer hours will force a "no" to your family and social life.
- The "yes" you say to hitting the gym at 5:30 creates a big "no" to sleeping in...but, happily, says "no" to gaining weight.
- Saying "yes" to a weekly date night with your partner will mean a "no" to working late, going out with friends, or watching television...and a "yes" to a more fulfilling relationship.

As you can see, it's important to be mindful of each yes and no that follows from your daily decisions.

Some people create imbalance in their lives by saying "yes" to every person and opportunity that comes their way. Others do the opposite, shutting doors with reactionary "no" responses to any new idea. Either way, unconscious yes or no patterns limit our choices and our joy.

**Action:** Where do you say "yes" and "no" in your life? Which of these choices are congruent with your beliefs and desires? Which are not?

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*With every experience, you alone are painting your own canvas, thought by thought, choice by choice.*

~ Oprah Winfrey

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Every day we are saying YES to the things we choose to do, say, feel, and think. We are saying NO to the things we elect not to do or create in our lives.

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**Action:** Pay close attention to the choices you make this week. Write down each choice and its "yes" and "no" components, noting which choices align with your deepest desires and which do not.

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*The strongest principle of growth lies in the human choice.*

~ George Eliot

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Every yes is backed up by the universe, as is every no.

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We have to say NO to others in order to say YES to ourselves.

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The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

## **Monday:**

Every yes is backed up by the universe, as is every no. For this reason, you must be careful to say "yes" only to things that are aligned with your true desires. Each time you say "yes," you are asking the universe for more of that outcome. For instance, a yes to sound financial management will gain you more prosperity. A yes to neglecting your car's maintenance will bring you breakdown after breakdown.

When you say "no," the universe hears it loud and clear and responds, "Well, I guess this person doesn't want more of this in his life! I'll stop giving him any!" People who say "no" to hearing others complain around them will soon find that no one whines in their presence. On the other hand, if you say "no" to meditation and relaxation, your stress level is likely to start climbing.

**Action:** What do you want more of right now? How will you say "yes" with your actions today?

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Say NO more often than you say YES.

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**Action:** What do you want less of in your life? How will you let the universe know?

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When you don't follow through on something you intended to do, you are saying "no" to your desired outcome in favor of something else.

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## **Tuesday:**

We have to say "no" to others in order to say "yes" to ourselves. Many individuals have a hard time saying "no" to other people. Friends, family, and co-workers continually make requests. You cannot respond with a powerful, authentic "yes" unless you are conscious that you have a choice. Remember, each time you say "yes," you are saying "no" to something else.

You only have 24 hours of time and a given amount of energy and mental space with which to say "yes" each day. Be sure to save some of your yes's for yourself.

**Action:** List the people in your life that you have a hard time saying "no" to.

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## **Wednesday:**

Say "no" more often than you say "yes." Do you ever struggle to complete projects? It may be because you, like many people, say "yes" to everything that sounds good. You agree to a project based on its merits rather than on the basis of whether it FITS into your life. Your new "yes" creates a "no" to finishing other projects.

Say "no" to most opportunities so you can say "yes" to the best ones. When you say "no" to many things, you have the space to align with who you really are and to complete each project you start.

**Action:** Make a list of all the projects you're working on or wanting to finish.

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**Action:** Which projects will you say "no" to, at least for now, so that you can complete the most important ones?

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*Conventional wisdom is not to put all of your eggs in one basket. 80/20 wisdom is to choose a basket carefully, load all your eggs into it, and then watch it like a hawk.*

~ Richard Koch

What would you say yes to if you had total power to do what you wanted?

## Thursday:

When you don't follow through on something you intended to do, you are saying "no" to your desired outcome in favor of something else. Next time you find yourself not following through, ask yourself what you're saying "yes" to.

**Action:** Complete the following sentence:  
"When I say no to \_\_\_\_\_, it's because I'm saying yes to \_\_\_\_\_." Find a way to swap the two and say "yes" to your highest intention.

## Friday:

Make a list of all the things to which you would say "yes" if you had total power to do what you wanted. By doing so, you can become clear about what you truly want.

**Action:** What would I say "yes" to if I had total power to do what I wish?

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## What Do You Really Want? 2

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**Action:** Make a list of the things you've brought into your life that you don't want. Look for the ways you've said "yes" to those things.

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Focus on your desires and begin to say "no" to everything else so that you have the space to create the life you want.

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### ACTION ITEMS

- Review the material in this section, focusing on your answers to the questions in the exercises.
- Make a list of your top values and put it where you're sure to see it daily. Use your list of values to help you make decisions that reflect what matters most.
- Review your top five goals twice a day – first thing in the morning and at the end of the day.
- Review your action plan and insert the action steps in your planner or on a calendar.
- Each day, work on your big goals first and fill with less important items.
- Complete Balance Builder #1 to become aware of the times you say "yes" to what you really want and when you say "no." (Hint: the more often you say "yes" to what you want, the faster it will come to you.)

Are you saying YES to things you DON'T want in your life?

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*Don't say you don't have enough time. You have exactly the same number of hours per day that were given to Helen Keller, Pasteur, Michelangelo, Mother Teresa, Leonardo daVinci, Thomas Jefferson, and Albert Einstein.*

~ H. Jackson Brown

The average person uses 13 different methods to control and manage his time.

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Success doesn't come from having more time, but from using the time you have available more effectively.

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## **MANAGING YOUR TIME**

YOU may have heard it before...but I'll repeat it here because it's so important: We all have the same amount of time available to us each day.

One person's success doesn't arise from having more or less time than other people. Success in your professional (and personal) life is the result of the way you use the time you have available. Those who use time effectively almost always follow a strategy or a set of strategies for the way they move through their day.

The good news is that time management is something all of us can learn to use to create the life we truly want.

### **What you'll accomplish in this section:**

- Learn the high price of wasting a few minutes here and there.
- Plan for efficiency to get the most from the time available to you.
- Avoid common time traps.
- Learn to budget your time and energy for enhanced productivity and effectiveness.



## The High Price of Wasted Time

It's human nature to avoid making changes unless we feel a big push from behind or an equally strong pull from the future we'd like to create. That's certainly true when we're dealing with time management. Day after day, we spend (or waste) time in our old, familiar way...until something happens that demands a change in the way we handle the time we're given.

Maybe that something is discovering that wasted time has too high a price. Look at it from a purely monetary perspective. It doesn't matter if you're self employed or work for someone else. Just multiply your hourly rate by 5. What's the total?

That's the amount of money you're tossing away each week if you waste just one hour a day. If you want to really scare yourself, multiply the weekly total by 50 for the amount of money you toss out the window in a year just by wasting one supposedly insignificant hour a day.

Here's the cost of wasting just one hour a week for someone earning \$25 per hour:

$$\begin{aligned} \$25/\text{hour} \times 5 &= \$125 \text{ per week} \\ \$125/\text{week} \times 50 &= \$6,250 \text{ per year} \end{aligned}$$

"But I don't waste much time," you may be thinking. Well, maybe not all at once. But what about the few minutes you spend searching for files and phone numbers? And the 10 minutes you spend chatting with a colleague instead of working on the project that could make or break your career? Or the down time between projects because you haven't planned what to work on next? Those lost minutes scattered through the day can easily add up to a more than an hour every day! Plug that into the calculation and you'll see the true cost of lost time.

To see how well you use your time, keep a daily log in 15-minute increments for a week. The log doesn't have to be elaborate. You can create your own print the **Daily Log** ([www.dreamjobcoaching.com/DailyLog.pdf](http://www.dreamjobcoaching.com/DailyLog.pdf)) on the Dream Job

*A man who dares to waste one hour of life has not discovered the value of life.*

~ Charles Darwin

The average executive wastes an hour a day looking for important papers, totaling more than six weeks annually. Based on a \$40,000 annual salary, the cost of this search is \$5,000. (Vicki Norris ©Restoring Order, 2002)

Waste just one hour a week and you'll throw away a lot!

$$\begin{aligned} \$25/\text{hr} \times 5 &= \$125 \text{ per wk} \\ \$125/\text{wk} \times 50 &= \$6,250 \text{ per yr} \end{aligned}$$



## Plan for Efficiency

Henry Ford consulted an efficiency expert to help him build cars faster and more economically. Ford's expert studied and analyzed the manufacturing process, then came up with a plan that would minimize wasted motion and maximize productivity. That plan was the assembly line. It quickly accomplished its purpose and became a standard in the industry.

You don't have to manufacture cars to take advantage of the time saving tips the assembly line process offers. Through regular planning and preparation, you can avoid wasting time and energy and maximize your productivity. You might even find extra hours in your day to complete the work that will help you accomplish your most important goals.

Time is a precious resource, so treat it accordingly. You don't have to schedule every minute of your day, but if you exert more control over your schedule, you'll find the improvements in your productivity and efficiency will be large. Your investment in planning will ultimately reward you with more time and less stress in your life.

### 1. To-Do Lists

There's a critical difference between an action plan and a to-do list. An action plan includes all the steps necessary to accomplish a specific goal. A to-do list is a collection of all the tasks you need to perform, including your action plan steps. That difference is crucial because we have many tasks to perform that have no direct connection to our goals, and it's all too easy to let them overwhelm our action plans.

To avoid that danger, to-do lists should always be prioritized in terms of their importance to our top goals. That means your action plan steps need to receive top billing, with other tasks fitting in around them (remember the rocks in the jar?)

Whether you create a short to-do list for each day or maintain a categorized collection of all your tasks depends on how you work most productively. If you find yourself overwhelmed by the sight of all your tasks in one place, transfer tasks to a daily list each evening or before you start your day.

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*Happy people plan actions,  
they don't plan results*  
~ Dennis Wholey

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Spending 10 to 15 minutes every morning mapping out your day can save up to 6 hours a week.

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Time is a precious resource, so treat it accordingly.

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**Action:** Which works best for you, a daily to-do list or a comprehensive list of tasks? How will you record your list (lined tablet, paper planner, or computer software program)?

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*He who every morning plans the transactions of the day and follows out that plan, carries a thread that will guide him through the labyrinth of the most busy life.*

~ Victor Hugo

**2. Organize your life on a weekly basis.**

Every Sunday evening, review your top goals. Plan to spend time each day during the week concentrating on projects with the highest priority level, and you'll be pleasantly surprised with the results. Integrate aspects of your long-term goals into your daily to-do list to quickly accomplish your most important projects.

Review your top goals at the beginning of every week and plan your activities around them.

**Action:** Choose a quiet place and plot out your activities in a daily planner for the week ahead.

**3. Plan your work**

Set aside 10 to 15 planning minutes at the beginning or end of each day to create a to-do list for your upcoming activities. The key is awareness of your important tasks as you begin each day. This advance planning can save you up to an hour each day because you'll work far more efficiently.

**Action:** What time of day is best for you to set aside for planning: morning or evening? Commit to a time period now.

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**4. Prioritize your most important activities**

As you create your to-do list, number your tasks in order of priority. If you need help identifying the most important items on the list, ask yourself two questions:

- (1) If I could complete just one activity/task today, what would it be?
- (2) Is this activity the best use of my time, knowledge, creativity, and experience?

Once you've determined which task is the top priority, focus on it until it is finished. Then recheck your priorities and focus your efforts on the next most important activity. By diligently following this process, you'll have a greater sense of accomplishment at the end of the day. Consider scheduling appointments with yourself to work on the projects that are most important to you.

**Action:** List the top three tasks you want to accomplish today.

- (1) -----
- (2) -----
- (3) -----

20% of the average workday is spent on "crucial" and "important" things, while 80% of the average workday is spent on things that have "little value" or "no value."

The first hour of your workday sets the pattern for the entire day. Make sure that it is productive.

**5. Use your most productive hours for your most important tasks**

Are you an early riser or a night owl? Ask yourself when you are most productive and schedule your day accordingly. Choose a daily goal and decide what time of day you have the most energy or creativity to get the job done. Commit time to that goal.

**Action:** What is my most productive time of day?

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**Action:** What one daily goal will I accomplish during that time?

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6. Reserve the first hour for the most important tasks

The first hour of your workday sets the pattern for the entire day. Make sure that it is productive. Ask yourself, "What do I need to get done today in order to feel complete?" Your response will reveal the most important tasks for that day. By completing those first, you will be focusing more on what is important and less on how fast you are working.

If you spend 20% of every day focusing on the most important tasks, you will accomplish 80% of your results. (You may recognize this as the Pareto Principle or 80-20 rule.)

Action: What tasks will I complete in my first hour today?

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*The first hour of the morning is the rudder of the day.*  
~ Henry Ward Beecher

Group similar tasks together to boost efficiency.

Schedule one or two time periods during the day to work only on non-urgent activities.

7. Treat each day as unique

As you schedule each day, group similar tasks together. For example, by organizing all your errands on one day and your planning tasks on another, you can increase your efficiency in both areas.

Action: What are the activities that take up the major part of my day?

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Action: How can I group similar tasks into a specific day or period?

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Activity type/group	Time/day schedule	
-----	-----	Respond to voicemail and e-mail messages twice a day.
-----	-----	
-----	-----	
-----	-----	
-----	-----	
-----	-----	
-----	-----	Handle activities and information as they occur rather than putting them aside for later.

**8. Carve out time for non-urgent activities**

Schedule time during the day to work only on non-urgent activities. Examples include phone calls, handling mail, and paying bills. Depending on your schedule and business activities, you might want to schedule two periods each day for these activities.

**Action:** What 30-minute period(s) will I choose for non-urgent activities? (Note: Choose times when you will not be preoccupied with a deadline or project.)

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**9. Manage your voice mail and e-mail twice daily**

Allow for two discrete sessions per day to check and respond to voice mail and e-mail messages. During that time, do this activity and nothing else. Sort your phone calls into high and low priority. During the rest of the day, limit your use of the phone and e-mail in order to focus on the project/task at hand.

**Action:** What two times will I choose for voice mail and e-mail that work best for me? (Perhaps first thing in the morning and after lunch or just before lunch and shortly before the end of the workday.)

(1) -----  
 (2) -----

**10. Use an "as you go" task system**

As you go through your day, activities and information will cross your path. Handle them as they occur. Resist the urge to put them aside or add them to your to-do list to complete at a later time. Your goal is to "handle it once." When you review the growing list of tasks you've completed during the day, your sense of accomplishment will soar.

*So celebrate what you've accomplished, but raise the bar a little higher each time you succeed.*

~ Mia Hamm

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**Action:** What three activities/items do I regularly put aside or delay instead of handling them as they occur?

- (1) -----
- (2) -----
- (3) -----

At the end of each day, review your to-do list and examine what you accomplished, what you could have done more efficiently, and what still needs to be done.

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**11. Take breaks**

When your energy level drops or you find yourself becoming too reactive to people or situations, take a rejuvenation break. That may involve physically moving away from your work area, getting some fresh air, listening to music, or talking with a friend. Find something that helps you recharge.

**Action:** What five activities rejuvenate me?

- (1) -----
- (2) -----
- (3) -----
- (4) -----
- (5) -----

**12. Review each day and plan the next day**

At the end of each day, review your to-do list and examine what you accomplished, what you could have done more efficiently, and what still needs to be done. Enjoy the sense of accomplishment that results from checking off items in your daily planner. Notice which tasks may require more time than



originally anticipated and adjust accordingly. Either at the end of that day or the next morning, update your to-do list so that your plan will be clear as you start the day.

**Action:** What did I accomplish today?

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**Action:** What are the most important tasks for tomorrow?

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*There is no such thing in anyone's life as an unimportant day.*

~ Alexander Woolcott

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Either at the end of that day or the next morning, update your to-do list so that your plan will be clear as you start the day.

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**Avoid Time Traps**

Time traps are the pitfalls we can fall into if we're not paying attention. They seem to lay in wait for us as we innocently go about our day. They will rob you of time, energy, and focus if you let them. The only way to avoid time traps is to be aware that they exist and stay alert, ready to block or divert them.

*Time is that quality of nature which keeps events from happening all at once. Lately it doesn't seem to be working.*

~ Anonymous

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We all have our own set of time traps, the ones that trip us up frequently. Here are some that catch my clients:

Time traps will rob you of time, energy, and focus if you let them.

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- Spending a disproportionately high amount of time in the offices where the most congenial people are, as opposed to where the most important issues are.
- Wasting too much time getting daily updates on routine activities as opposed to waiting for a more meaningful weekly summary.
- Jumping too eagerly into routine, straightforward work and putting off the more complex and difficult tasks.
- Not starting the more important work first thing in the morning.
- Not bothering to make up a schedule for each day.
- Scheduling each day so tightly that it is impossible to stay on track and the schedule quickly becomes meaningless.

**Action:** What time traps will you avoid this week?

1. -----
2. -----
3. -----
4. -----
5. -----

## Procrastination

Because it's such a common and costly time trap, procrastination requires special attention. Born from doubt and fear, procrastination leads you to question your worthiness and ability to achieve. It blocks you from doing the very things that will offer the greatest rewards and can be the most significant obstacle to your success, if you let it.

The following success formula halts procrastination and encourages you to take action, which can generate immediate results in your life.

Motivation + Energy + Action = Results

## Motivation

What inspires, motivates. So every morning ask yourself, "What will inspire me today?" For an inspirational boost, consider subscribing to an email list that offers a daily motivational quote such as **Motivational Quotes.com** ([www.famous-motivational-quotes.com/](http://www.famous-motivational-quotes.com/)). You can also talk with an upbeat friend who never seems to be short on inspiration.

Once you feel inspired, it becomes easier to tap into the motivation to move forward. Look to your values and goals and remind yourself of the reasons they matter to you.

## Energy

Motivation by itself creates energy, but you can accelerate the process by adding fuel to the mix. Take a short walk (outside is best, but a stroll down the hall will work) and focus your attention on your goals and the motivation you have to achieve them.

## Action

Once you feel inspired and motivated to do something, act on it. Don't worry too much about whether you are doing the right thing. If it turns out to be a mistake, that's okay. Learn from it and move on to the next inspiration.

## Learn from success

One of the reasons we procrastinate is fear of failure. But that didn't stop Walt Disney. He was fired by a newspaper editor for lack of ideas and went bankrupt several times before he built

*A wise person does at once,  
what a fool does at last. Both  
do the same thing; only at  
different times.*

~ Baltasar Gracian

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Motivation plus energy plus  
action is the antidote for  
procrastination.

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Disneyland. It didn't stop Henry Ford either. He failed and went broke five times before he finally succeeded.

Were Disney and Ford finally able to succeed because they had a special talent? Not necessarily. The difference between success and failure isn't talent, but persistence, determination, and action. Find the motivation, fuel your energy, then take action on your dreams and goals.

**Action:** What inspires you?

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**Action:** What motivates you?

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**Action:** How can you fuel your energy today?

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**Action:** What three actions will you take this week to move toward success?

- 1. -----
- 2. -----
- 3. -----

*Nothing in the world will take away persistence. Talent will not; nothing is more common than an unsuccessful man with talent. Genius will not; unrewarded genius is almost a proverb. Education will not; the world is full of educated derelicts. Persistence and determination alone are omnipotent.*

~Calvin Coolidge

The difference between success and failure isn't talent, but persistence, determination, and action.

**BALANCE BUILDER #2:  
Budget your time and energy**

Most of us accept the limitations of our bank accounts. When we only have a certain amount of money each week, we're careful about how and where we spend it. If we aren't, we'll wind up bankrupt. But we're not as cautious about our time. Many of us find ourselves spread too thin, stressed out, and exhausted at the end of the week. Somehow, we forget that no commodity in the world is more limited than that most precious resource...time.

Regardless of our financial situation, each of us has but 168 waking hours each week. We can't buy more! How will you spend your time? Will you give it away to activities and people you don't enjoy? Or will you invest it wisely by developing passionate relationships and a prosperous career? Can you share time generously with people who appreciate you? Do you choose to invest some of your time to maintain your body, home, and possessions?

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

**Monday:**

Accomplish what's most important

If you had only one hour at your disposal this week, how would you use it? If you're smart, you would choose your highest priority. So what will you do with the 168 hours you have available? Will you work 14 hours a day and arrive home exhausted and grumpy? Or will you say, "My life is just as important as my job! I'm leaving at 5pm so I can be with my family or walk the dog. Maybe I'll go for a hike or play my guitar for awhile." Use your 168 hours to accomplish what is most important.

**Action:** What are your most important priorities?

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*Time is a fixed income and, as with any income, the real problem facing most of us is how to live successfully within our daily allotment.*

~ Margaret B. Johnstone

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Regardless of our financial situation, each of us has but 168 waking hours each week. Use your 168 hours to accomplish what is most important.

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**Tuesday:**

Take a visual tour

Take a visual tour of your house. Then your car. And, finally, your office. Look for the things that need to be taken care of that you just haven't gotten around to. See in your mind the messy kitchen, the broken tape deck in your car, the unfinished report on your desk, the overflowing in-basket, the overflowing laundry basket... Surely you can imagine others.

You know it will take an investment of time and energy to complete those jobs, so you keep putting them off. But all those uncompleted tasks drain your energy whether you're consciously aware of it or not. They're always there, in the back of your mind, weighing you down.

If you commit to completing all the half-done tasks and fixing all the broken items in your home, car, and office, you will reclaim the energy that has been stuck in those areas. You will enjoy a sense of freedom and relief that will make your efforts worthwhile.

**Action:** What half-done tasks could you accomplish today?

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**Wednesday:**

Clear out your space

In addition to time, other factors such as emotions, clutter, and stress affect how much movement we can make toward our dreams. If you want a greater sense of control over your time and energy, clean out your closets. Or cancel the lunch date with that so-called friend you can't stand. Clean up your physical and emotional space, and you'll feel a rush of energy that will carry you forward and enable you to focus on what is most important in your life.

*Three Rules of Work: Out of clutter find simplicity; From discord find harmony; In the middle of difficulty lies opportunity.*

~ Albert Einstein

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Clean up your physical and emotional space, and you'll feel a rush of energy that will carry you forward and enable you to focus on what is most important in your life.

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**Action:** What can you clear out of your physical and emotional space this week?

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*Another flaw in the human character is that everybody wants to build and nobody wants to do maintenance.*

~ Kurt Vonnegut, Jr.

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**Thursday:**

Time for mundane tasks

Those of us on the achievement path often create ambitious weekly goals and to-do lists. Think about your 168 waking hours. Have you allocated every single hour to your projects with work, family, community, and recreation? Aren't you forgetting something? Your carpet hasn't been vacuumed in a month!

Strike a balance between moving toward your goals and maintaining your home, body, and spirit.

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A balanced week includes time for the mundane tasks such as laundry, paying bills, and taking out the trash. Make sure you also create space in your schedule to cultivate your garden, meditate, and exercise. Strike a balance between moving toward your goals and maintaining your home, body, and spirit.

Be realistic about the demands on your time, energy, and emotions.

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**Action:** What mundane tasks do you need to do regularly? Add them to your schedule now.

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**Friday:**

Recognize your limitations

Be realistic about the demands on your time, energy, and emotions. Adjust your expectations when a crisis strikes and be gentle on yourself.

If your child is sick or the biggest deadline of your career is coming up, recognize that a new project may not get off the ground this week. Don't put yourself down. Recognize the limitations of your situation and give yourself credit for handling the illness, the deadline, the flat tire, or any other surprise that disrupts your plans.

**Action:** What unexpected demands cropped up in the last month. Have you given yourself credit for getting through them?

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*There is not enough time to do all the nothing we want to do.*

~ Bill Watterson

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Have you given yourself credit for getting through all the unexpected demands that cropped up in the last month?

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**Action Items**

- Review the material in this section, focusing on your answers to the questions in the exercises.
- Keep a daily log for a week and determine your personal cost for the time you waste.
- Try each of the twelve recommended ways of planning for efficiency to learn which work best for you.
- Integrate at least three of the methods for increased efficiency today and every day this week.
- Become aware of your personal time traps and avoid them whenever possible.
- Complete Balance Builder #2 to budget your time and energy more effectively.





## MANAGING YOUR SCHEDULE

BEING busy has become a status symbol. If you're not struggling to keep up with all you have to do, you may feel you're not making it. But the reverse is true. The more stress your schedule is causing, the less effective and productive you are.

Instead of packing your days with more than you could get done in a week, use your time in the most productive way possible. You'll get more done in less time and feel more satisfied with the results.

### What you'll accomplish in this section:

- Learn how to regain control of your schedule
- Add YOU to your schedule
- "Save" time by consolidating and outsourcing
- Set time limits and create uninterrupted blocks of time
- Start avoiding urgencies and enhance your focus
- Develop the ability to promise less and enjoy more

*If we take care of the minutes, the years will take care of themselves.*

~ Benjamin Franklin

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For every hour of planning, 3 to 4 hours are wasted while waiting for information, not being prepared, and poorly managed tasks.

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The more stress your schedule is causing, the less effective and productive you are.

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**Nine Ways to Tame Your Schedule**

**1. Under-schedule yourself daily**

As you plan your day, schedule only three-fourths of the available time. For example, during a 40-hour workweek, schedule just 30 hours. This gives you 10 "extra" hours to handle the inevitable unplanned tasks and emergencies that pop up. You'll also have time for thinking, planning, and other creative activities.

**Action:** How many hours will you "un-schedule" this week?

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*He who would make serious use of his life must always act as though he had a long time to live and schedule his time as though he were about to die.*

~ Emile Littre

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Underschedule and under-promise every day.

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**2. Under-promise throughout the day**

As you plan your day, allow yourself to lower your expectations and take on fewer commitments. This one simple step will create less pressure and increase your energy dramatically throughout the day. If you've already made so many commitments that your schedule is booked for the next several weeks, renegotiate as many as possible to lighten your load.

**Action:** What commitments can you renegotiate to free up some breathing space in your schedule?

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**Action:** In what ways will you under-promise today?

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**3. Schedule daily appointments with yourself**

We tend to honor the appointments on our schedule, typically putting them above the tasks on our to-do list. You

can use that tendency to focus on scheduled commitments to your advantage by making appointments with yourself. This will help you work on the projects that are most important to you. Become your own consultant and add periodic planning sessions with yourself to your planner. Use that time to decide where you want to direct your energy and time.

There cannot be a crisis next week. My schedule is already full.

~ Henry Kissinger

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**Action:** What two time slots during the day will you reserve for yourself?

(1) .....

(2) .....

You can't really "save" time. But you can use time productively that would otherwise be squandered.

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#### 4. Save time in your daily schedule

You can't really "save" time. But you can use time productively that would otherwise be squandered. When you're standing in line or waiting for appointments, catch up on material you need to read. Use technology to increase your productivity by loading digital documents onto your PDA or laptop to read or handle when you're on the go. Consolidate errands so that you make only one trip. Review the activities that fill your day and determine ways they could be done more efficiently or eliminated. By shaving minutes off several tasks throughout the day, you can free up a larger block of time later.

Consider outsourcing the activities that drain your efforts and energy so that you can leverage your time for goal-related tasks.

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**Action:** How will you save time in your schedule today?

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#### 5. Outsource

You can't do everything on your own. Trying to do it all alone is a common cause of stress and low productivity. You need to focus your attention on your priorities. Consider outsourcing the activities that drain your efforts and energy so that you can leverage your time for goal-related tasks. Don't think of it as burdening someone else. The tasks you hand off to others may help them fulfill their own goals.

**Action:** What activities will you outsource this week?

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Quantify what you are going to accomplish by imposing a time deadline or budget on your activities.

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**6. Set time limits**

Realize how valuable your time is and quantify what you are going to accomplish by imposing a time deadline or budget on your activities. At the start of a phone conversation, let the other person know how much time you have for the conversation. Do not go over your time limit. Make phone calls right before lunch or at the end of the day so that the other person is motivated to end them more quickly. Schedule appointments with start **and** end times.

Avoid activities that seem urgent but merely distract you from accomplishing your important long-range projects.

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**Action:** In what ways will you begin to set time limits for your activities this week?

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**7. Avoid urgent activities**

Avoid activities that seem urgent but merely distract you from accomplishing your important long-range projects. It's tempting to think that a few minutes here and there won't matter, but they add up faster than you realize. If you spend the majority of your day putting out fires, you'll never find time for the important activities in your life.

When someone asks you to do something that doesn't specifically need your attention, use this phrase with a smile: Oh, I'm sorry. I'm afraid I don't have the time to take care of that in the way it deserves. Thank you for thinking of me." Commit that phrase to memory. Practice it. And use it consistently.

**Action:** What are 2-3 seemingly urgent, but unimportant, activities you can avoid this week?

- (1) -----
- (2) -----
- (3) -----

An average interruption during the work day consumes ten to twenty minutes in getting back on track, not counting the actual time with the interrupter.

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**8. Narrow your focus**

A critically important ability for effective time management is focus. Spreading your attention among an assortment of tasks is draining and counterproductive. By narrowing your focus to your highest priority, you'll automatically ensure greater productivity.

Interruptions are barriers to effective time management.

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**Action:** In what ways will you narrow your focus this week?

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**9. Set aside uninterrupted time**

Interruptions are barriers to effective time management. One way to avoid interruptions is to close your door and make it clear that you are not to be disturbed. Another is to schedule regular meetings, using this time for non-pressing issues with people you interact with the most. You might also schedule blocks of time for phone calls and let people know that you will return their calls at those times.

**Action:** In what ways will you set aside uninterrupted time this week?

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## **BALANCE BUILDER #3: Promise Less, Enjoy More**

One of the greatest contributors to imbalance and stress is the self-defeating habit of overpromising. You overpromise every time you make a commitment to yourself or another, implicitly or explicitly, that you will be challenged to keep.

When we overpromise, we set ourselves up to lose. We seem to think that if a promise isn't a stretch, it doesn't mean anything. Or if it's easy for us to fulfill, we'll lose our motivation. This simply isn't true. While the adrenaline rush of hurtling full-speed toward a deadline has a certain motivating quality, it is exhausting and stressful.

The delight of having made a smaller commitment, then surprising yourself and the others involved with what you actually deliver is a far better and more sustainable motivator.

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

### **Monday:**

Honesty and compassion

The objective of underpromising is to be more honest and compassionate with ourselves and others. When we don't know how to be compassionate, we frequently overextend ourselves, demanding more and more. Without a commitment to honesty, we try to win others' confidence by making grandiose promises, then scurrying to deliver what we said we would. By setting ourselves up this way, we guarantee, even if we complete what we promised, that we will exhaust our energy and inner resources and rob ourselves of stillness and peace.

Underpromising gives us a reserve from which to create high achievement, increased confidence, and the momentum for great things to occur in our lives.

While customers, lovers, family, and friends may seem to want big promises from us, and while the overpromising lifestyle is seductive, this week is your chance to try a more compassionate, more honest, and ultimately more fulfilling way of life.

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*An acre of performance is worth a whole world of promise.*

~ William Dean Howells

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When we overpromise, we set ourselves up to lose.

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Underpromising gives us a reserve from which to create high achievement, increased confidence, and the momentum for great things to occur in our lives.

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**Action:** Where do you set yourself up to lose by overpromising?

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*Some promises are better left unsaid.*

~ Ashlee Simpson

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**Action:** Where can you underpromise right now?

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Using underpromising language builds a cushion for you so you don't feel overwhelmed, stressed, or pressured for your time, energy, or activities.

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**Tuesday:**

The language of underpromising

How you communicate affects how you feel. When you want to use the skill of underpromising, it's important to communicate effectively. This means using language that builds a cushion for you so you don't feel overwhelmed, stressed, or pressured for your time, energy, or activities. Here are a few examples of language you can use to underpromise:

Yes, I can have that done by ...

(Before you answer, add 20% more time than you think it will take to finish. Wouldn't you rather have it done early and impress the other person? This also gives you the space to allow all the other things that will be added to your plate after you commit to this project or activity.)

I'll give it my best shot and report back on...

(Give a date 20% later than you think you need to accomplish what you'd like, but remember... you don't have to specify how much you'll accomplish!)

I'll meet you for lunch at ..."

(Before you answer, add at least 15-30 minutes to the time so that you can arrive early and relax.)

I want to help you and can put in a few hours...

(Rather than dropping everything, promise an hour or two of support. This way, if your time becomes free, you can be there and they will appreciate what you can give.)



I'd like to say we could do X, but I'm not sure about that yet. I know we can commit to Y, and I'll let you know about the other parts.

(Let people know what parts are certain and where the stretch will be. This will not turn them off; they will be impressed with your honesty and THEN with the miracles you perform without promising to do so.)

**Action:** What underpromising language will you use today? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Wednesday:**  
Stop overpromising at work

Throughout the day, be aware of the ways you've been overpromising. Begin to promise less and get your motivation from overdelivering rather than from trying to catch up to your deadlines and commitments.

**Stop overpromising with ...**

**Your schedule**

With a spouse, a date, or a friend...always give yourself an extra half hour. Learn the delights of being early.

**Your boss**

When you say you'll have something done, add a week to the schedule. Your boss will be thrilled when you're finished 3 days early. If you're given a deadline, ask to have it moved back.

**Your employees**

Stop promising more resources, promotions, raises... give what's warranted now, but promise **nothing** for the future.

**Your customers**

When delivering products or services, always tell them it will take longer and cost more than you think. Then, surprise them and yourself!

*A promise made is a debt unpaid.*

~ Robert W. Service

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Get your motivation from overdelivering rather than from trying to catch up to your deadlines and commitments.

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**Yourself**

When you evaluate your own performance and results, hold realistic, conservative expectations so you can accomplish and deliver more. Most people give themselves far too little credit, wasting precious energy on self-deprecating remarks.

*We promise according to our hopes and perform according to our fears.*

~ Author Unknown

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The language of overpromising:

- I'll call you (and the other five people I need to call) tomorrow.
- I'll have the project done by tomorrow (even though I know it will cause me to stay up all night).
- I'll be there in 20 minutes (though it's 30 miles away).

Most people give themselves far too little credit, wasting precious energy on self-deprecating remarks.

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**Action:** What overpromising language have you used in the last week related to your schedule, your boss, your customers, your creditors, or yourself?

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**Thursday:**

Stop overpromising at home

**Romantically**

Sometimes we oversell ourselves...mildly exaggerating or trying to impress. Undersell yourself instead. It's much more impressive.

**With your kids**

If you can't do something with a child or give that child something he wants, simply tell him "no" and offer an explanation. Overpromising leads to disappointment and eventually to mistrust.

**With your extended family**

Don't say you'll be out to visit or you'll write soon unless you will. If you feel the urge to promise, use that energy to actually **do** something.

**With your physical home itself**

Don't expect yourself to clean, fix, or redecorate your house in the upcoming year if you aren't ready to do it. It might be

better to allow yourself to commit only to things around the house that you want to get done and know you can finish. The language of overpromising:

- Honey, I’m going to bring you flowers more often.
- Kids, I’ll be home by six every night from now on!
- We’ll come over and visit every Sunday because you mean so much to us. (Even worse: if you’re making this overpromising remark without consulting other members of your family, you’re committing them!)
- We’ll get the filing under control this weekend.

**Action:** What overpromising language have you used at home in the last week?

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*Unless commitment is made, there are only promises and hopes... but no plans.*

~ Peter Drucker

Even when we’re not chasing the dreams we most long to achieve, we aim for some pretty unrealistic goals.

**Friday:**

Stop overpromising yourself

- If my meeting is done by 11:30, I can get across town by noon... if I hurry!
- Starting next Monday, I’m going to make 20 sales calls a day every day!
- I’ll lose 20 pounds before the reunion.
- I’ll clean the garage out soon!
- I should get my filing done by the end of the week.

We are less realistic inside our own minds than anywhere else. Even when we’re not chasing the dreams we most long to achieve, we aim for some pretty unrealistic goals. Whether it’s “hitting every light just right” so we can rush to our next destination or fitting another personal or work project onto an already-full plate, we repeatedly set ourselves up for failure. Here are some of the most common ways we overpromise ourselves:

**Scheduling** - packing in too many appointments, too close together

**Unrealistic to-do list** - more things than we have time to accomplish

**Goals** - vague aspirations for which we have inadequate planning or support

**Commitments** - agreeing to do something we don't have time to do

These are not the kind of challenges you want to be creating in your life! When you stop setting yourself up to fail, you'll reclaim the energy to tackle the callings you were born to answer.

**Action:** What are some of the ways you overpromise yourself? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Once you stop overpromising yourself, you will be delighted to find that the smaller commitments and aspirations, when fulfilled, are much more satisfying than the broken promises you used to make.

*Commitment leads to action.  
Action brings your dream closer.*

~ Marcia Wieder

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Fulfilling smaller commitments and aspirations is much more satisfying than the broken promises that result from overpromising.

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### Action Items

- Review the material in this section, focusing on your answers to the questions in the exercises.
- Try each of the nine recommended ways to schedule your time more productively.
- Integrate the methods that work best for you into your life on an on-going basis.
- Complete Balance Builder #3 to experience ways to stop overpromising at work and at home...and to stop overpromising yourself.



## MANAGING PROJECTS

SIMILAR to an action plan, a project is an undertaking that involves a series of steps. Projects, however, can be more extensive than an action plan and often involve a group of people. If you work for someone else, it's likely that you'll be assigned various projects over the course of your employment. If you're self-employed, you may generate the projects yourself or handle them for clients. Hopefully, most of the projects you accept will involve your goal-related action plans.

However projects become part of your workload, they must be managed for maximum efficiency and effectiveness and, of course, superb results.

### What you'll accomplish in this section:

- Understand the two-phased process for planning projects
- Learn to complete projects efficiently
- Gain a 10-step process for maximum project effectiveness
- Design a support system to see goals (and projects) through to completion

*The secret of getting ahead is getting started. The secret of getting started is breaking your complex overwhelming tasks into small manageable tasks, and then starting on the first one.*

~ Mark Twain

Hopefully, most of the projects you take on will involve your goal-related action plans.

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## Project Planning

Project planning is a two-phased process. First, you must identify the steps required to complete the project, breaking the steps into the smallest possible increments. Second, you must determine how much time you can realistically commit to the project.

Here's an example of the process:

1. In general, how many hours per day are available to work on the project?

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What is the minimum amount of time you believe you can work on the project?

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2. How long do you believe the project will take?

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Is there enough time available to accomplish the project (or make significant progress on it) during the next week?

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3. On a scale of 1 to 10, how confident are you that you can commit sufficient time (on a daily basis) to this project?

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4. If your confidence level is not a 10, how much time can you commit to the project and feel that level of confidence?

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5. Schedule blocks of time into your calendar for the next week, and make it a priority to stick to them.
  - Add a little extra time for delays, interruptions, etc.
  - Schedule time between projects for phone calls, e-mail, walks, etc.

*All time management begins with planning.*

~ Tom Greening

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Project planning is a two-phased process.

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6. Each day, evaluate how well you were able to keep your commitments for the day. If you consistently fall short, you may need to modify the timeline.
7. If a new project shows up, prioritize your commitments and re-evaluate the time commitment in light of the new information.

Don't overcommit. You'll just worry about what's not getting done instead of focusing on the projects at hand.

Don't overcommit. You'll just worry about what's not getting done instead of focusing on the projects at hand.

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### Project Efficiency

Completing a project efficiently means achieving results with a minimum of time and effort. For most people, the hardest part and the phase that causes the most delays is at the beginning. Let's get beyond that right now using the following tips. They will help you get projects off the ground quickly and keep the momentum going throughout the process.

#### 1. Start now

No matter how big a project might seem, the most important step is the first...getting started. Hesitancy, fear, and self-doubt fade with action.

Select a project that's important to you and your goals. What steps can you take to move it forward? Don't worry about the best way to launch your project. Just begin. Once you get beyond the initial inertia, the best way to proceed often reveals itself.

**Action:** What are two or three first steps you can take for the most important task or project you want to complete?

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Commit to taking action on that first step today.

#### 2. Take baby steps.

Most long-term projects are never started because the whole endeavor seems so daunting. When you take on the entire project all at once, you can become overwhelmed. Take small steps that you know you can accomplish. The more realistic your expectations, the better. When you gain momentum, you can let the energy and excitement of the project take over, and you'll be fully engaged.

*A journey of a thousand miles starts in front of your feet. A tower nine stories high is built from a small heap of earth.*

~ Lao-Tzu

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For most people, getting started is the hardest part of a project.

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**Action:** Look at your number one project and the first step you need to take. Break that step into its smallest components and work on one of those.

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*It is only the first step that is difficult.*

~ Marie De Vichy-Chaconne

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When you take on the entire project all at once, you can become overwhelmed. So take small steps that you know you can accomplish.

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**Project Effectiveness**

An effective project is capable of meeting its objective, of achieving or exceeding the desired results. You might think about a project’s characteristics in this way: Efficiency is the manner in which a project is completed while effectiveness has to do with the results you achieve.

*Efficiency is doing things right. Effectiveness is doing the right thing.*

~ Zig Ziglar

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**1. Focus on just three major projects**

Most people limit their success by juggling too many projects. Make a list of all the projects you have in play and table or delete all but the three most important. Give yourself the opportunity to do great work on the three that mean the most.

Efficiency is the manner in which a project is completed while effectiveness has to do with the results you achieve.

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**Action:** What major projects am I juggling right now?

- 1. -----
- 2. -----
- 3. -----
- 4. -----
- 5. -----

**Action:** Of the projects listed above, which three are the most important right now?

- 1. -----
- 2. -----
- 3. -----

**2. Define it**

To be effective, a project needs to work toward a clear objective.

**Action:** Select one of the top projects. What is the end result I want to achieve with that project?

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**3. Create smaller tasks within each project**

Break the project into manageable pieces. Identify all the specific parts of the project.

**Action:** What are the parts of my highest priority project?

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*The Ninety-Ninety Rule of Project Schedules: The first ninety percent of the task takes ninety percent of the time, and the last ten percent takes the other ninety percent.*

~ Arthur Bloch

**4. Establish deadlines for your projects**

Coordinate the project workload back into your weekly and daily schedules. With a deadline, you will be more focused on the task at hand so that you can accomplish it on time.

**Action:** What is the deadline for my highest priority project?

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The majority of your projects take too much of your time and energy and could be delegated so that you can work on the most important.

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**5. Ask Yourself the Right Questions**

Periodically evaluate your progress on your projects. Use the following questions to determine how you're doing:

- Am I accomplishing the most important tasks today?
- Will it matter if the assigned tasks or the entire project doesn't get done today?
- This week?

**6. Delegate tasks and projects.**

The majority of your projects take too much of your time and energy and could be delegated so that you can work on the most important. Determine what resources are needed (people, equipment, materials), how much of each you need, and when you need them. Then research what resources are available and start delegating.

**Action:** What one project can I delegate today?

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*If your project doesn't work,  
look for the part you didn't  
think was important.*

~ Arthur Bloch

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**7. Communication is key**

Interview all the major stakeholders to learn about their expectations and what is important to them. Then design and implement a communication system that will keep everyone informed.

**Action:** What major stakeholder will I interview this week and when?

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Plan to create, write, and  
work intensively on projects  
during peak energy times.

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**8. Create during high-energy times**

Plan to create, write, and work intensively on projects during peak energy times. For most people, peak times occur between 11am-1pm and 4-6pm.

**Action:** When is my high-energy time?

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**9. Evaluate**

Review your progress periodically. This will help you stay on track. After the project has been completed, take a few minutes to evaluate your success and identify areas for future improvement.

**Action:** How well did I do on the last project I completed?

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**Action:** What do I need to improve on future projects?

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*I cannot always control what goes on outside. But I can always control what goes on inside.*

~ Wayne Dyer

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**10. Reward Yourself**

Take some time to enjoy and appreciate your accomplishments. You deserve it -- you did a great job!

**Action:** How can I best reward myself?

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Take some time to enjoy and appreciate your accomplishments.

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## **BALANCE BUILDER #4: Design Your Support Systems**

We've seen many clients decide what they want and start taking action only to lose focus, get distracted, or pick another goal (or project) to start on... long before they see results. This is disappointing and it ruins your reputation as a follow-through kind of person. Having a coach is a great way to gain reliable support as you complete goals and major projects, but coaching alone is not enough support for seeing them through to full realization.

Most people don't support their projects, plans, and goals nearly enough, and this is why 99% of ambitions fizzle out before they become reality. The right support systems will keep you in action and push you along the road to your goals.

Every ambition, creative idea, or desired outcome requires support. Results are created from consistent action, but people are inherently inconsistent in motivation, energy, and attention levels. Strong support systems help us overcome inconsistency to reach our goals, complete projects effectively, and make our dreams a reality. Like a rock climber who slips, you can be caught and saved by the support systems you put in place before you begin your ascent.

This week, you'll design and put into place the support system for a primary project or goal you want to pursue over the next one to three months. Use the daily lessons to help you refine your plan.

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

### **Monday:** Importance

Without support, your goal is likely to be overwhelmed by all the other demands in your life. Picture yourself on a playing field. Your goal is the achievement of an important project. On the opposing team, you see lots of burly characters in fighting mode. Their uniforms are labeled "Inertia," "Obstacles," "Procrastination," "Discouragement," "Responsibilities," "Fear," and "Isolation." Your own uniform displays the word "Goal." As you look for your teammates, you soon realize you have none.

*You are a product of your environment. So choose the environment that will best develop you toward your objective. Analyze your life in terms of its environment. Are the things around you helping you toward success - or are they holding you back?*

~ Clement Stone

Most people don't support their plans and goals nearly enough, and this is why 99% of ambitions fizzle out before they become reality.

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You're on your own. Do you see yourself scoring in this game?

Your goal simply has too many opponents for it to succeed without support. In order to beat your goal's competitors, you need allies. This week, you will add "People," "Commitment," "Focus," and "Inspiration" to your team.

**Action:** Select a goal that you'd like to work on over the next one to three months.

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**Tuesday:**

The Human Edge

Mutual progress comes from having people around you who want you to succeed, prosper, and live life to the fullest. People are the first ally you will add to your support team.

The human component of a support system can be composed of one special person, a group of people already in your life, or a Master Mind group you design specifically for the purpose of supporting one another.

People have the power to encourage you, move you forward, remove obstacles in your path, provide perspective, acknowledge big steps, and share wins.

What are the qualities you want in a support partner? Do you need a mentor who delivers a lot of wisdom? Or a goal buddy who's on your same path? Perhaps you will feel best supported simply by asking your circle of friends and family to acknowledge your progress and celebrate your commitment.

Perhaps coaching, guidance, or counseling is in order for fears or beliefs that limit you. Or you might like to be accountable to someone who will check in periodically to see if you did what you said you would do. Some people thrive when they have someone who can share their wins. Others want to explore and clarify who they are, what they want, and where they want to go. Whatever their role, a supportive person or group in your life will allow you to move faster and farther than you could alone.

*...we can be as separate as the fingers, yet one as the hand in all things essential to mutual progress.*

~ Booker T. Washington

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People have the power to encourage you, move you forward, remove obstacles in your path, provide perspective, acknowledge big steps, and share wins.

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Do you already have someone in your life who can be the person who helps you achieve what you truly want? Call that person. Or find a way to meet inspiring, supportive people.

Whoever your support people are, have them join you in creating, developing, and implementing the support systems that will help you achieve your dreams.

**Action:** What type of human support do you need for your goal?

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**Action:** List at least three people who might be able to provide that support:

1. -----
2. -----
3. -----

**Wednesday:**  
Commitments

Commitments are promises you make to yourself or others. Most people are reasonably reliable when they promise a client, friend, or employer they'll do something. But when it comes to yourself, do you sometimes weaken your commitment standards? Do you fail to follow through on things that are "just for me," the actions that will accomplish your personal goals? When you break commitments made to yourself, you develop a reputation with yourself as unreliable.

A compelling commitment starts with picking the right goal. Most people get excited about the outcome, but then fail to follow through. Use this checklist to make sure your goal is absolutely right for you at this time:

- Does the outcome match who you truly are? Is it YOURS, and not a goal someone else would want you to pursue?
- Do you have people who will support the actions this goal will require? Naturally, not everyone in your life will support

*Objectives are not fate; they are direction. They are not commands; they are commitments. They do not determine the future; they are means to mobilize the resources and energies of the business for the making of the future.*

~ Peter Drucker

When you break commitments made to yourself, you develop a reputation with yourself as unreliable.

your every endeavor, but do those you most trust and respect agree that this is the right direction for you now?

- What actions are required to achieve this goal in the timeframe you're considering? Do you have the skills, motivation, support, and time in your life to consistently take these actions? Be realistic!

Once you've decided that a goal is right for you, it's important to stay committed every single day to taking the actions necessary. Naturally, you will get distracted and your commitment level will waver. But in truth, you are in command of your own commitment level. Each day, ask yourself, "On a scale of one to ten, what is my commitment level to taking these actions today?"

If you do not shout a resounding TEN, figure out why. Do you have too much on your plate? Are you tired or feeling ill? Are you questioning the goal? Are fears coming up? Go back and revisit the list of reasons you simply MUST achieve this goal. Rereading or recreating this list will help you connect to your "level 10" commitment. Turn your fears over by listing them, then asking, "What's the worst that could happen?" Then ask, "When that happens, what will I do?"

You know you can handle it! Make your commitment level a ten, every day!

**Action:** What is your current commitment level to the goal you chose?

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**Thursday:**  
Focus

Focusing on what you want and the actions you'll have to take to your goals is key to success. Racehorses wear blinders so that they do not focus on the other horses, do not get spooked by the thousands of people watching them, and do not take their eyes off the goal. You need the same support: blind yourself to everything except the finish line and the steps you must take to get there.

*Every single life only becomes great when the individual sets upon a goal or goals which they really believe in, which they can really commit themselves to, which they can put their whole heart and soul into.*

~ Brian Tracy

Once you've decided that a goal is right for you, it's important to stay committed every single day to taking the actions necessary.

The brain's reticular activating system (RAS) blocks out most of the information coming into your awareness. How will you make sure that your RAS has information that helps you achieve your goal and blocks out information that will throw you off track? There are several systems you can use to make sure you stay focused:

- **Your calendar.** Block out time each day or week to take the actions you need to take. Many people make the mistake of listing a project on their to-do list, then never following through on that vague instruction. Instead, simply commit the time, complete the tasks, and let the result create itself.
- **The word "no."** Every time someone else makes a request of you, ask yourself, "Given that my goal is a top priority, will agreeing to this request get in the way?" If so, politely refuse the request.
- **A list of actions.** When you've mapped out your plan for achieving a goal with well-sequenced, specific action steps, you always know what to do next. Refer to this roadmap each time you sit down during your scheduled "goal action session" and take the next step on the list.
- **A goal buddy.** Many of us are goal-aholics. We have a new project for every day of the week. A goal buddy will help you stay focused by reminding you that you're working on a powerful, compelling goal already and that the next goal will be ready and waiting once you've accomplished your current goal.
- **Incubation list.** If you find yourself working on too many goals at once, try moving some of them to an incubation list. That's a way of saving goals for later by writing them down on your "maybe someday" list, thus relieving yourself of adding another goal to an already-full plate.
- **Little reminders everywhere.** Post-it notes are a goal's best friend. Put them on your mirror, dashboard, inside the refrigerator! They will help you remember your goal and its importance.

Today, implement as many of these systems as you need to stay 100% focused on your goal until you complete it. The power of focus is on your side.

*The person who makes a success of living is the one who see his goal steadily and aims for it unswervingly. That is dedication.*

~ Cecil B. DeMille

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When you immerse yourself in an environment of inspiration, you stay in action and feel on track and joyful.

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**Friday:**

Inspiration

When you immerse yourself in an environment of inspiration, you stay in action and feel on track and joyful. When we are inspired, we feel our full strength. We know we can do it and become aware of the ways life is supporting us. We embrace life, with all its challenges!

What inspires you? Movies with underdogs who win? Beautiful music? Time spent in nature? Stories of people who have succeeded in achieving their dreams? Being with people who believe in you? Talking with a mentor about what's possible for you? Sports heroes and coaches? Eloquent quotes? Creating new art or ideas? The world is full of inspiration; you simply have to look for it.

**Action:** What inspires you?

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Even more important than finding inspiration "out there," you must become an inspiration to yourself. By taking the actions you know will lead you where you want to go, you not only move along your path, but you develop momentum. All the inspiration outside you says, "Dreams are achievable."

But it's your own actions that tell you the most precious secret in the world: "You are capable of achieving YOUR dreams!" Try it today. Go out and create some compelling evidence that you CAN achieve your goals. You'll inspire everyone, especially yourself.

**Action:** What can you do this week that will prove that you can achieve your dreams?

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*You can't wait for inspiration. You have to go after it with a club.*

~ Jack London

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Even more important than finding inspiration "out there," you must become an inspiration to yourself.

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## Action Items

- Review the material in this section, focusing on your answers to the questions in the exercises.
- Implement the project planning process for your next big project.
- Apply the two project efficiency steps to a project you're having trouble getting off the ground.
- Try the 10 methods for project efficiency and note the ones that work best for you.
- Complete Balance Builder #5 to build a support system for completing your projects and achieving your goals.

## MANAGING INFORMATION

THE information age has taken its toll. Despite the computer technology that was supposed to create a paperless society, we're still drowning in paper in the form of brochures, catalogs, handouts, magazines, books, etc. In addition, we're bombarded with information through a variety of audiovisual and digital sources including television, radio, email, and the internet. It's impossible to process all of it, but we do try.

The solution is to determine what information is truly important and then manage that information effectively. By implementing the ideas in this section, you can regain the hour or more each day that you now spend rearranging papers, looking for information, and sorting it all. That's at least five hours each week that you will gain.

You'll also be less distracted by unnecessary details and have more time to focus on what is really relevant to your goals. You will have a clearer picture of your goals and a much lower stress level. Most importantly, you will be more aligned with the overall objective of what you most want to create.

### What you'll accomplish in this section:

- Learn to tame the paper trail
- Gain the skills to process each piece of paper as soon as it reaches you
- Find ways to handle mail and email with a minimum of fuss
- Identify important information in the midst of the unimportant
- Understand yourself better by identifying what you resist and why you do it

*Everybody gets so much information all day long that they lose their common sense.*

~ Gertrude Stein

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The average person today (1999) receives more information on a daily basis than the average person received in a lifetime in 1900.

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Determine what information is truly important and then manage that information effectively.

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**Manage Information Effectively**

Here are ten ways you can begin to manage information more effectively:

**1. Tame the mess**

Is your office clear of clutter and well organized? If not, your productivity will suffer. Once the mess has gotten out of hand, don't try to overcome it all at once. Break it into small tasks and commit to spending just 15 minutes a day clearing the clutter. You'll be pleased not only with your recovered productivity, but with the enhanced level of joy your work brings you. One of the most fundamental ways to enjoy your work more is to keep your work environment clean, clear, and pleasing to work in.

**Action:** What 15-minute period of time will you schedule for clearing the clutter?

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**2. Organize your filing system**

A proper filing system helps clear your desk and enables you to locate and retrieve essential information quickly. Consider color coding your files according to project, client, or activity to reduce the time spent looking for missing files. To decrease the number of files you have to handle, ask yourself how important each document will be six months from now and whether it includes information you can readily find elsewhere. If you can easily replace the information, toss your copy.

**Action:** Will you color code your files according to project, client, or activity? What colors will you use for each category?

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*The goal is to transform data into information, and information into insight*

~ Carly Fiorina

A person who works with a "messy" or cluttered desk spends, on average, 1 1/2 hours per day looking for things or being distracted by things or approximately 7 1/2 per workweek. "Out of sight; out of mind." When it's in sight, it's in mind.

If you can easily replace the information, toss your copy.

### 3. Control paper flow

Do you handle paper effectively or does it overwhelm you? The first step in managing information overload is to develop good screening techniques. Decide what types of information are truly important to what you want to accomplish and which information can be ignored as irrelevant. Narrow your focus. Don't read every document that comes into your hands. Instead schedule one 15-minute time period each day to prioritize the documents.

**Action:** What 15-minute time period will you use for prioritizing documents?

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### 4. Scan all documents

Don't read every document word for word. Quickly scan instead to see if it's worth your time to read the entire document. If so, focus only on the most important pieces of information. Develop guidelines to help you determine what makes a document read-worthy.

**Action:** What guidelines will you use to determine whether you should read an entire document?

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### 5. Throw, refer, act, or file

A recent Accountemps survey indicates that the average executive in the U.S. wastes more than a month each year trying to find things. That's what happens when we keep every piece of paper that comes into our lives rather than deciding how to deal with it on the spot.

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In every survey taken over the last 20 years, managing paperwork falls in the top ten time-wasting activities of managers.

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Decide what types of information are truly important to what you want to accomplish and which information can be ignored as irrelevant.

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When handling information that comes to you in paper form, throw, refer, act on, or file it immediately. Handle each piece of paper only once and make it a priority to throw away more than you keep.

**Action:** What are three types of information that you will:

**Throw**

- (1) -----
- (2) -----
- (3) -----

**Refer**

- (1) -----
- (2) -----
- (3) -----

**Act on**

- (1) -----
- (2) -----
- (3) -----

**File**

- (1) -----
- (2) -----
- (3) -----

*I write down everything I want to remember. That way, instead of spending a lot of time trying to remember what it is I wrote down, I spend the time looking for the paper I wrote it down on.*

~~ Beryl Pfizer

60% of materials going to storage have no retention value and should have been destroyed at the office level.

Regular postal mail should be sorted into categories as soon as you receive it.

**6. Organize all incoming mail**

Regular postal mail should be sorted into categories as soon as you receive it. Decide on the categories ahead of time and, if your volume of mail is high, create folders for each. Open the high-priority mail first. Briefly scan everything else and toss junk mail immediately. Apply the throw, refer, act, or file process.

**Action:** What categories will you use to determine the priority of your mail?

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*It seems a long time since the morning mail could be called correspondence.*

~ Jacques Barzun

**7. Handle email**

If you're like most people, you spend far too much time reading and replying to e-mail. It's estimated that the average worker sends and receives 190 messages per day. That eats up a lot of time that could be applied to your high-priority tasks.

Just introducing email into an office increases paper printing by 40%.

Learn the art of scanning your email and deciding instantly whether it's worth reading in its entirety. Most of it won't be. Create filters in your email program to sort the messages for you. Use spam filters to screen out the junk, but do so carefully. It's all too easy for important messages to be eliminated with the spam. Decrease the number of subscriptions and keep only the ones that you find truly inspiring or relevant to your goals.

Learn the art of scanning your email and deciding instantly whether it's worth reading in its entirety. Most of it won't be.

Reply to important email immediately (and briefly) rather than filing the messages for a response at a later time. Create folders for each project or person so that you can easily locate valuable information.

**Action:** Check off each action as you complete it.

\_\_\_ I have created email filters to sort messages automatically.

\_\_\_ I've implemented spam filters for my email.

\_\_\_ I have a plan for guarding important email from the spam filter.

\_\_\_ I have created folders for important email.

\_\_\_ I send a brief reply immediately upon receiving most messages.

**8. Tickler system**

Developing a tickler system allows you to handle more activities that need to be acted upon by certain dates than you can manage through a file of "upcoming" events. Tickler

systems can be either electronic or paper or a combination of both.

Whatever combinations you use as your tickler system, follow these simple rules of thumb:

- File each folder, card, or record in one, and only one, designated place.
- If a file is out, use it or lose it. Every file should be in one of two places: (1) in use on your desk or (2) stored in its designated space. Put files away immediately after use.
- File material immediately. Whenever you have new information for your files, file it at the time you get it. Don't create file piles.

**Action:** How will you begin to develop your own custom tickler system this week?

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*Vital papers will demonstrate their vitality by spontaneously moving from where you left them to where you can't find them.*

~ Anonymous

So much information flows through even the most low-tech offices that we really need electronic help to keep track of the most vital information.

**9. Computerize your files**

We haven't achieved (and may never achieve) the paperless office, nor would most of us want to. However, so much information flows through even the most low-tech offices that we really need electronic help to keep track of the most vital information. We need a way to create, change, store, and locate information as quickly and simply as possible.

Here are two solutions that are available now:

- The Paper Tiger, <http://www.thepapertiger.com>. This paper management system uses a complex indexing ability that is sure to help you file and retrieve your files with ease without the need to scan the documents into digital format.
- Papermaster, <http://www.documagix.com>. This software system utilizes a scanner and computerized filing cabinet. This is a great way to decrease or even eliminate your physical paper load and still keep needed information on hand.

**Action:** How will you begin to computerize your files this week?

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*If you file your waste-paper basket for fifty years, you have a public library.*

~ Tony Benn

## 10. Identify essential information

To handle information effectively, you need to know what types of information are most valuable to you. The table below gives you a place to start.

Check off the types of information you need in order to work effectively. After identifying the information you must have, develop a plan for when and where you will address and store it.

Type of information	Paper	Computer	Where	When
Upcoming events and activities	-----	-----	-----	-----
Customer or client records	-----	-----	-----	-----
Financial and tax information	-----	-----	-----	-----
Project or task material	-----	-----	-----	-----
Business cards	-----	-----	-----	-----
Information on key subjects	-----	-----	-----	-----
A tickler system	-----	-----	-----	-----
Computer disks	-----	-----	-----	-----
Newspapers	-----	-----	-----	-----
Magazines	-----	-----	-----	-----
Tapes	-----	-----	-----	-----
Books	-----	-----	-----	-----
Mail	-----	-----	-----	-----
Phone messages	-----	-----	-----	-----
Other	-----	-----	-----	-----

Half of what is known today, we did not know 10 years ago. The amount of knowledge in the world has doubled in the last 10 years. And it is said to be doubling again every 18 months.

Establish a familiar routine for processing, storing, and using information.

**Action:** How will you begin to identify essential information this week?

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**11. Schedule information management**

If you toss, refer, act, or file as information reaches you, you will have very little left to process. But stray pieces of information are bound to sneak into the system. To process those, set up a regular and convenient time for putting information where it belongs. Establish a familiar routine for processing, storing, and using information.

If filing accumulates, catch up during “down time” such as when the network computers are offline, when your meeting is delayed, or when scheduled appointments cancel unexpectedly.

**Action:** How will you schedule information management this week?

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**Action:** How will you begin utilize your down time this week?

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*Science is organized knowledge. Wisdom is organized life.*

~ Immanuel Kant

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If filing accumulates, catch up during “down time” such as when the network computers are offline, when your meeting is delayed, or when scheduled appointments cancel unexpectedly.

## **BALANCE BUILDER #5: Learn from resistance**

Picture this: You are walking down a path on your way to somewhere you very much want to go. Whistling a happy little tune, you know you're headed in the right direction. You look up from the path just in time to avoid running smack-dab into a brick wall! "Where did that come from?!" you ask yourself.

Not expected. Not wanted. NOT a part of the plan. Nonetheless, there it is, plain as day.

Now...what do you do? Do you:

- (a) Sit down and spread out a picnic, figuring, "Hey! Perfect opportunity to have lunch!"
- (b) Feel your way along the wall, searching for a door through it, a tunnel under it, or a way around it so you can continue toward your destination?
- (c) Back up, get a running start, and hurl yourself into the wall with all your might?

While this illustration may make you laugh at the suggestion that anyone would choose option "C", this is what most of us do repeatedly throughout the day.

When was the last time you didn't get what you wanted? What did you do about it? We're guessing that something akin to option "C" is your standard reaction. I've been known to respond to certain events with resistance myself...but not more than a few dozen times a day.

This week's Balance Builder is designed to help you practice letting go of resistance to the large and small things in your life that don't quite go your way. Every day something happens that we don't like, whether it's the traffic jam that delays your arrival at an important meeting or the piles of paper that seem to multiply on their own. The fact that things seldom go as we would like is not intrinsically exhausting; it is our pattern of resistance that wears us out!

Each time you find yourself dissatisfied or unhappy this week, ask yourself, "What am I resisting now?" Then save yourself the energy drain by either accepting what's going on or creating other options.

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*Resistance is thought transformed into feeling. Change the thought that creates the resistance, and there is no more resistance.*

~ Robert Conklin

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The fact that things seldom go as planned is not intrinsically exhausting; it is our pattern of resistance that wears us out!

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**Action:** Keep a journal this week of the things that you resist. What frustrates you most? As you catalog your resistance points, see if there are patterns that emerge. Are you resisting things far beyond your control, like the traffic jam you run into at the same spot every morning? Do you have a list of things about your spouse that you simply do not accept? Do strangers seem to tick you off unceasingly? What larger solutions, options, and realizations can spring from your newfound awareness?

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

## **Monday:**

The three ways to handle resistance

Your assignment for the week is to recognize where you are resisting. When you resist without being aware of that constriction of energy, you have no other options. All you can do is continue to resist. Once you begin to notice your resistance points, the next question will be, "Now what? What do I do with resistance?" With awareness come additional options. Once you recognize you're resisting something, you can continue resisting it, accept it, or take action to change it.

Tomorrow we'll focus on the circumstances in life that are beyond our control and some of the ways you can handle resistance when changing your situation is NOT an option. For today, let's presume that the issue you are resisting IS something that you can take action to change.

Think of something that's frustrating you, that's draining your energy, and that you wish you could change. The first important step in handling resistance is to feel the effects of the resistance and have those be okay. We often pile layers of resistance on top of one another: resist an event, then become frustrated with the resisting, then deny that we're frustrated at ourselves for resisting...and so on.

To stop this downward spiral, simply experience the resistance as it happens. This means that you will feel the tension, discomfort, lack of clarity, and frustration with the resistance. As you feel them, notice where in your body you experience these effects. Ask, "How can I allow this feeling to be here?"

*At fifteen life had taught me  
undeniably that surrender, in  
its place, was as honorable  
as resistance, especially if  
one had no choice.*

~ Maya Angelou

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We often pile layers of resistance on top of one another: resist an event, then become frustrated with the resisting, then deny that we're frustrated at ourselves for resisting...

**Action:** What are you resisting today?

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*Some people want it to happen...Some people wish it to happen...Others tear down the walls of resistance and make it happen.*

~ Author Unknown

Once you're fully present with the resistance, you are free to look at your three options: resist, accept, or take action to change the situation.

**Option 1: Resist**

It's not unenlightened or foolish to continue resisting once you realize that's what you're doing. It may be tiring, and it's not likely to change the situation, but it may be a viable option nonetheless. The most stressful thing about resisting is the unconscious aspect. If you can look yourself in the eye and say, "Yes, I know it's fruitless, but I feel the need to continue resisting this for the time being, rather than making a more productive choice," you release a tremendous burden and leave the door open to other options in the future. You are getting in touch with what is real and obvious in the moment and this moves you forward even if you take no distinct action.

Once you recognize you're resisting something, you can continue resisting it, accept it, or take action to change it.

**Option 2: Accept**

When you recognize that you are resisting, another option is to embrace the circumstance that is confronting you. Acceptance does not mean reaching a place where you LIKE the circumstance! It just means that you accept what is before you. Each turn in the path that takes you into unfamiliar and uncomfortable territory also leads you to learning, growth, and fresh insights into your own nature. When you accept an event, a circumstance, or a situation, you allow what is present and release the expectations you have placed upon yourself and the situation. You may even find yourself enjoying the circumstance you had been resisting.

**Option 3: Take action to change the situation**

If you aren't able to accept a circumstance and you don't want to continue resisting it, it's time to roll up your sleeves and make a change! First, shift your attention away from the circumstance that displeases you and focus instead on the desired outcome. What do you really want? What is the missing ingredient to create that outcome? What action, shift, or input is required now? Asking yourself these questions will



awaken your resourcefulness and shift you from resistance into action and from action into enjoyment of your new circumstance.

**Action:** Today, and for the rest of this week, practice accepting your resistance, then choosing one of the options for handling it: continue to resist, accept the circumstances, or take action to change the situation.

**Tuesday:**

Face the facts

As much as we enjoy grabbing the bull by the horns, seizing the day, and creating our own destiny, the all-too-resistible truth is this: most of the circumstances you face on a day-to-day basis are beyond your control. This is not to say that your overall life circumstances elude your influence. I'm merely pointing out that many of the things that drain people's energy are things that:

- (a) shouldn't be draining, because
- (b) we shouldn't be exerting ourselves over them... because
- (c) WE CAN'T CHANGE THEM.

There is a tremendous amount of personal energy to be harnessed when you give up fighting how things are in this moment. Simply facing the facts is profoundly freeing. "Aaah!" you'll say once you get the hang of this. "I can stop being mad about the traffic now because my anger doesn't eradicate the traffic! And since being bummed out by the phone ringing off the hook doesn't stop that either, I'm ready to give up resisting that, too."

Facing the facts is a lazy person's dream come true. If eliminating all non-essential work from your life is appealing, you'll love what we're proposing. We're guessing that a great proportion of your prior "job description" in life will evaporate once you give up resisting what is.

Today is your day to face the facts. Look around you for things you cannot change. Far from feeling overwhelmed or helpless at this awareness, we hope you'll feel a delightful sense of clarity. You'll be clear about which circumstances you can stop resisting, and those you can do something about.

*Face the facts of being what you are, for that is what changes what you are.*

~ Soren Kierkegaard

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Facing the facts is a lazy person's dream come true.

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You'll see the areas in which you can reclaim your energy and the places where it can be fruitfully invested. Once you see all this, you'll feel the relief of having "faced the facts."

**Action:** What are some of the things you've been resisting that you cannot change?

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*Your life is the sum result of all the choices you make, both consciously and unconsciously. If you can control the process of choosing, you can take control of all aspects of your life.*

~ Robert F. Bennett

**Wednesday:**

Identify your options

People seeking balance are not so much looking for simple lives, but lives that they can deal with on a day-to-day basis without exhausting themselves. The everyday occurrences in life drain you more when you approach your experiences as challenges, when your decisions are picking "the lesser of two evils," and when you create a habit of identifying obstacles, problems, or stumbling blocks without also identifying options.

Resistance and resentment are the fruits of a seed called powerlessness.

Today, begin the new habit of reducing the resistance to circumstances in your life through identifying your options. Resistance and resentment are the fruits of a seed called powerlessness. Powerlessness is seldom real, but your false perception of powerlessness renders you impotent in the face of everyday circumstances.

**Action:** Think of a circumstance in your life in which you feel that you have few options.

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Perhaps you've already dismissed all the options you currently see because each seems undesirable for at least one important reason. I challenge you to look beyond what you've identified.

**Action:** Find 3-5 more options beyond what you've previously identified.

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*Happiness equals reality  
minus expectations*

~ Tom Magliozzi

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In looking for options, don't start with "what's possible" or what's closest to happening. Start with what's most desirable.

Think of the characteristics or hallmarks of your ideal outcome. What events would bring that about? These are options, even if they aren't things you could bring about on your own. At the very least, they are prayers sent out to the universe, signals that you are ready for a breakthrough. Who knows what can happen now?

Focusing on the options will connect you with resources you had neither used nor even recognized before.

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One thing we know for certain is that focusing on the options will connect you with resources you had neither used nor even recognized before.

**Thursday:**

Release your expectations

Think about the kinds of things you resist. What are the circumstances that trouble you in your personal and professional life? Do you know the common denominator for nearly every resistance you have? If you're like the hundreds of clients and workshop participants I've worked with, your resistance points are founded on one thing: attachment to an expectation.

Most resistance is founded on wanting something to be a certain way and then finding out it is not that way. The ironic thing about this truth is that our own expectations are like an "average" or "median" in a statistical sample. They are the dotted line down the middle of the road. The range of all possibilities extends in BOTH directions around our expectations. Things may turn out the way we wanted, or they may not be as good... but there is an equal chance that the universe will give us a pleasant surprise.

So if we look for circumstances to match the picture we hold in our mind, not only will we frequently be disappointed,

frustrated, and resistant, but much of our resistance will be aimed at a circumstance BETTER than that which we'd imagined!

If you want to ensure that you're not resisting kismet, circumstances better than you'd imagined, then it's time to stop resisting altogether. If you make a policy of allowing life to unfold as it will, then responding consciously to the circumstances before you, you'll conserve a tremendous amount of energy you had been spending resisting everything that didn't match your picture of how things "should" be.

It's been said that it doesn't matter how good your "plan A" was...it's how you handle "plan B" that counts. Life is a long string of Plan B's, isn't it? The appearance of Plan B does not signify the "failure" of Plan A, so just enjoy your Plan B.

Let's say you had planned to meet a friend at 7:00 pm. It's now 7:15 and he's nowhere in sight. Plan A is down the tubes. How do you handle it? Most of us tend to remain attached to Plan A, even though circumstances seem to be suggesting an alternative. Allowing what is opens you to the positive possibilities, the ideal Plan B.

Resisting what is, on the other hand, will send you into the spiral of resistance we discussed earlier. Not only will you be closed to the synchronicities and surprising pleasures all around you, but you will cultivate frustration, irritation, and anger before you have a chance to see the full picture.

**Action:** Practice looking with relish for Plan B each time Plan A seems to have fallen through. You'll love the possibilities that open up before you.

### **Friday:**

Learn from your resistance

We've discussed ways to HANDLE resistance. Today let's touch upon the greatest gift that resistance has to offer us. Resistance is a doorway to our hearts. Our deepest desires and our greatest fears form the seeds of our attachments. Our attachments produce our resistance. When we encounter this resistance, we have the opportunity to not only handle it gracefully, but to stand in awe as those passions and pains deep inside us are revealed for our learning.

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*The force of the blow depends on the resistance. It is sometimes better not to struggle against temptation. Either fly or yield at once.*

~ Francis Herbert Bradley

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The appearance of Plan B does not signify the "failure" of Plan A, so just enjoy your Plan B.

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The process of learning from resistance is not always easy, but it is surprisingly quick for those who are brave enough to enter into it. When you look deeply at your resistance, seeking to understand its source, the desires and fears that underlie your attachments can reveal themselves with almost startling speed. Like a cork bobbing up from under water, the realization of the source of your attachment will break the surface of your consciousness with a splash.

*Think about any attachments that are depleting your emotional reserves. Consider letting them go.*

~ Oprah Winfrey

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See if there is a pattern of attachment. Is this a familiar feeling? Under what other circumstances have you felt this way? Find the underlying need or fear. Are you attached to having, creating, or receiving something? Or is your attachment more of a fear, an attachment to making sure that something "bad" doesn't happen? Once you've found the underlying need or fear that creates the pattern of attachment, you can find a way to honor the need or fear in a constructive way.

Once you've learned to consciously release resistance, the depth of your learning will reveal itself in every corner of your life.

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Learning from resistance may happen quickly or it may take you several months. But once you've learned to consciously release resistance, the depth of your learning will reveal itself in every corner of your life.

### Action Items

- Review the material in this section, focusing on your answers to the questions in the exercises.
- Try each of the 11 suggested methods for managing information flow.
- Incorporate the methods that work best for you into your daily routine.
- Complete Balance Builder #5 to identify and learn from the things you resist.

## MANAGING PEOPLE

THE human factor is one of the most unpredictable influences on our ability to manage our time and achieve our goals. We're all trying to reach our goals and dreams and it's inevitable that our paths will cross in the process. It's also inevitable that we'll conflict with each other at times.

In order to achieve your goals as quickly and effectively as possible, it's in your best interest to find ways to work well with all the people in your life, including supervisors, clients, customers, subordinates, colleagues, vendors, family members, friends, and anyone else who touches your life.

### What you'll accomplish in this section:

- Gain 10 ways to establish boundaries.
- Learn four ways to say "no" at work.
- Identify five ways to lessen your workload.
- Learn to say "no" to anyone.

*Time is the most valuable coin in your life. You and you alone will determine how that coin will be spent. Be careful that you don't let other people spend it for you.*

~ John Dryden

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In order to achieve your goals as quickly and effectively as possible, it's in your best interest to find ways to work well with all the people in your life.

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**Top 10 Ways to Set Boundaries**

If your goals are repeatedly sidetracked by other people's projects, it may be time to look at your boundaries. Constant demands and requests from coworkers, colleagues, friends, and families can leave you drained and frustrated. If you find it uncomfortable to say "no," you need to change your perspective. By saying "no" to other people, you're saying "yes" to you and to your priorities and needs. And you're not really saying "no" to a person, but to her request.

Set non-negotiable boundaries to protect your comfort zone, then communicate them gently, yet firmly, to others. When you set boundaries for yourself and respect the boundaries of others, you are actually building stronger relationships. You're also gaining time and energy and enhancing respect for yourself and others.

Here are 10 boundary tips to get you started:

**1. List people who drain your energy.**

Even if you like them, they take your time without your permission.

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**2. Identify which boundaries you need to set.**

If you have trouble setting boundaries with specific people or specific situations, try to understand the situation. For example, you may be able to set a boundary with coworkers, but not clients.

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**3. Determine how you'll stand up for your needs.**

Many people mistakenly believe that setting boundaries upsets other people. While others may not get what they want in the short run, you will garner more respect from them and for yourself by standing up for your needs.

The average person gets 1 interruption every 8 minutes, or approximately 7 an hour, or 50-60 per day. The average interruption takes 5 minutes, totaling about 4 hours or 50% of the average workday. 80% of those interruptions are typically rated as "little value" or "no value" creating approximately 3 hours of wasted time per day.

When you set boundaries for yourself and respect the boundaries of others, you are actually building stronger relationships.

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**4. Make a short affirmation to describe your new boundary.**

An example would be, "I get to decide how to spend my time." or "My time is valuable and irreplaceable." Use whatever words are most powerful for you. This step is a booster you can use to remind you that setting boundaries is the right thing to do.

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**5. Rehearse away from work.**

Talk to yourself in the mirror, write in your journal, tape record yourself, or find a trusted friend to role-play with. This is new behavior. The more you practice it, the better you will become.

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**6. Offer options to the other person.**

Look for a win-win situation by taking control. For example, "I know that you would like to speak with me. Right now I need to finish this task. Can I call you later or would tomorrow be better?"

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**7. Communicate without anger.**

Be clear and respectful. Keep in mind that you are saying "no" to an unreasonable or inconvenient request, not the person as an individual.

*I am not in this world to live up to other people's expectations, nor do I feel that the world must live up to mine.*

~Fritz Perls

80% of our interruptions usually come from 20% of the people with whom we work.

Remind yourself that saying NO to a request means saying YES to you and your time.





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*Learn to say 'no' to the good  
so you can say 'yes' to the  
best.*

~ John C. Maxwell

**8. Relax.**

Before you respond, breathe deeply. Remind yourself that saying "no" to the request means saying "yes" to you and your time.

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Set boundaries in all areas of your life so that you are able to truly create the life you desire.

**9. Think ahead and prepare.**

List common situations that could use a boundary. If one of them comes up, you will have a pattern of action you can use at your fingertips. You won't even have to think about the best way to handle it; you'll know.

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**10. Check all your life's boundaries.**

See if you need to set boundaries with family and loved ones. They can be a wonderful part of a full life, but they, too, can drain your energy, time, and vitality. Set boundaries in all areas of your life so that you are able to truly create the life you desire.

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## Four Ways to Say No at Work

Maintaining your boundaries requires the ability to say "no." You may find it difficult to refuse new projects or assignments. Most of us accept new responsibilities at work without any resistance, feedback, or push back. We think, "It's only one more thing" or "I can handle it" or "I want to prove myself." So you say "yes" when you know you should say "no."

Here are four ways to say "no" and provide feedback and push back at work without appearing uncooperative. After applying these tips, you'll begin to notice a positive change in your workload, a decrease in the pressure you feel, and an increase in your overall productivity.

### 1. **Never commit immediately.**

No matter what type of project or assignment you are given, always take at least a few minutes before replying to the person making the request. First, check your calendar and workload. Look at all your projects, priorities, and responsibilities and see if the request can be accomplished within a reasonable time frame. Time, energy, effort, and prioritization need to be considered before moving forward with an answer. So, instead of saying, "Yes, I can do it and get it done tomorrow," say, "I can't do it right now because I have to complete projects X, Y, and Z by (date), but I could get it done a week from now."

### 2. **How critical is this new project or assignment?**

It's important to understand how critical this project is in relationship to who wants it done and why is it considered so important. People often state what they want, but it's not exactly what they need. The want can be based on pressure they are feeling without taking into consideration the big picture and the real sense of urgency. You can determine how critical a project or assignment really is only after you've taken a look at all the parameters.

### 3. **Provide feedback.**

Provide feedback to the person who is making the request so he has a reasonable understanding of your situation. Give the individual an overall perspective of your current workload. He may become an advocate who helps you come up with the best solution possible.

*We need to find the courage to say NO to the things and people that are not serving us if we want to rediscover ourselves and live our lives with authenticity.*

~ Barbara De Angelis

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No matter what type of project or assignment you are given, always take at least a few minutes before replying to the person making the request.

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4. **Set up realistic and accurate expectations.**

The only way you'll know if expectations are realistic and accurate is by taking into consideration everything that is going on instead of evaluating the situation based solely on the request being made by one person and his need. Allow yourself plenty of breathing space. Don't expect so much of yourself that all your projects suffer because you took on one more.

*Our environment, the world in which we live and work, is a mirror of our attitudes and expectations.*

~ Earl Nightingale

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**Actions:** What tasks will you say no to this week?

1. -----
2. -----
3. -----
4. -----
5. -----

Allow yourself plenty of breathing space.

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What people will you say no to this week?

1. -----
2. -----
3. -----
4. -----
5. -----

## Five Ways to Reduce Your Workload

Here are five strategies for working with others in your organization to reduce your workload so that you can get back to being effective and productive.

### 1. Give push back to your manager.

If a ton of information is sent to you when your manager gives you a new project, assignment, or task, what do you do? Try this two-step process.

Step 1. Ask your manager why this is so critical. The answer will help you understand the importance of a new task in relationship to everything else you are working on and enable you to decide how best to use your time.

Step 2. To give push back to your manager, ask this series of questions: "Do I have to get it done today? What are the consequences of not getting it done today? Can I push it back to another time? Is it as important as the other projects/assignments I am working on?"

### 2. Rebalance your workload.

If your workload is too high and too demanding, go to management and ask them to rebalance the load. This means discussing with them all that is on your plate (all of your responsibilities and job duties) and finding a strategy to rebalance your workload so that you have less to do. Others can take on some of your responsibilities so that you'll be able to focus on the areas that can help you and the company become more profitable and successful.

### 3. Set realistic expectations with your bosses.

Before you accept any new project, take into consideration all the information you are currently holding and all the responsibility you now have and communicate them to your boss. Before you take on a project, make sure the expectations that come with the project are realistic and fair.

### 4. Just say "no."

We are hesitant to say no because we fear rejection. We feel that someone will not like us if we do say "no." Why does this happen? It's because our belief system says we

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*You won't find a solution by saying there is no problem.*  
~ William Rotsler

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Before you take on a project, make sure the expectations that come with the project are realistic and fair.

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must please everyone. This shows up unconsciously and gets in the way of being effective in our work.

I had a client who said "yes" to every project so others would be impressed with her. Her plate was getting more and more full. As others began relying on her more, a trap of unrealistic expectations began to grow. Her work product declined and she wasn't getting as much done. She was saying "yes" to so many different things that it was undermining her success in the areas that provided the most recognition and related most to the job she was doing.

If you please everyone, it means you are saying "yes" to everyone. Begin saying "no" more often. Practice the muscle of no in low-risk situations so that when you really need to say "no," you'll be comfortable doing it.

## 5. Delegate, delegate, delegate

If you have people who work for you, delegate to them as much as possible. The more things you can get off your plate and onto someone else's, the easier it will be for you to be balanced.

Even if you have no one working for you, you may be able to delegate some of your tasks. Talk with your boss, explaining all the projects you have going on. Say, "Here are all of my tasks and responsibilities; which one has top priority?" You could ask him to give some of your lower priority tasks/projects to others on the team so you can tend to the most important items.

Delegating to your peers or even giving your boss responsibility for certain projects/tasks is a valuable skill to learn. Others may have more bandwidth or ability to get the project or assignment done than you currently have. By delegating to them, you are improving the productivity of your organization and your team.

The pressures and demands of work may seem overwhelming, but changing your attitude, learning to say "no," and negotiating with management and coworkers to decrease your workload will make a tremendous difference.

*Nothing is impossible if you can delegate.*

~ Author Unknown

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Practice the muscle of NO in low-risk situations so that when you really need to say "no," you'll be comfortable doing it.

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As your life/work balance improves, you'll become more effective, more productive, and more valuable to your team. And instead of feeling trapped, you'll finally be free to focus on the things that matter most.

**Action:** In what areas do you need to reduce your workload?

1. -----
2. -----
3. -----
4. -----
5. -----

**Action:** What tasks can you delegate to others?

1. -----
2. -----
3. -----
4. -----
5. -----

*Surround yourself with the best people you can find, delegate authority, and don't interfere as long as the policy you've decided upon is being carried out.*

~ Ronald Reagan

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As your life/work balance improves, you'll become more effective, more productive, and more valuable to your team.

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## **BALANCE BUILDER #6: Learn to Say No to Others**

One of the obstacles many people run into while building the life of their dreams is that their time and energy are sapped by the people around them. Who in your life drains your energy or demands your time at the expense of your true priorities? In large and small ways, we are all surrounded by constant requests and demands. A critical skill in living from your center is learning how to say no to others.

A consistent, thoughtful way of tempering these drains without alienating the people you care about is called "setting a boundary." Once you've effectively set a boundary with someone, it simplifies your relationship with them because they no longer do the thing that drains your time or energy, and no further negotiation is needed.

Boundaries differ from requests in that they are not negotiable. When you make a request, the other person can say "yes" or "no" or make a counter-offer. As you determine ways to set boundaries with others, you must be willing to absolutely require that your boundaries be respected. You must also develop the language skills to communicate this in a firm, yet caring, way.

Mutual respect is strengthened when you set effective boundaries and then honor the boundaries set by the other person. Setting and respecting boundaries together is a powerful way to build a relationship that supports the pursuits of both individuals on whatever level is appropriate. Boundaries serve you with co-workers, supervisors, clients, and in a variety of personal relationships.

Once you have developed the skill of effectively setting boundaries with others, you will have more time, more energy, and stronger relationships, simply because you're able to say "no" to a request without saying "no" to the person.

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

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*The art of leadership is saying no, not saying yes. It is very easy to say yes.*

~ Tony Blair

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Boundaries differ from requests in that they are not negotiable.

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## **Monday:**

The language of extending boundaries

Most of us are not skilled at saying no to others. We either let people walk all over us or we jump down people's throats. Today, we want to give you the language so you'll be able to say "no" to others in a way that they will understand and respond to positively.

We'll start with an example: the person who interrupts you while you're trying to work. This may be a spouse if you work at home, a co-worker in your office, or a friend who calls at inopportune moments.

Here's some language that works well:

I understand that you want to talk with me. I want to talk with you, too. Right now, however, I need to focus on this task because it's the most important use of my time. I'd like to ask you to speak with me later (you may suggest an appropriate time such as "this weekend," "at 5pm," or say, "May I call you back tomorrow?") Can you agree to that?

You're being reasonable, caring, and fully communicative. The individual with whom you're setting the boundary has two choices: she can honor your boundary or be unreasonable and disruptive. Should she choose the second option, you might go on to say:

I understand that you really want me to talk to you now. I am clear that I need to get back to work. I would like to talk with you later (you may suggest a time here). I ask that you allow me to go back to work now.

Another boundary-setting situation might occur when someone asks you to take on a new project. If you wish to say no, you might use the following language:

I want to do the project you've given me because I know it's important to the company. Given the other projects and responsibilities I have right now, I will not be able to give this project the attention and energy it deserves until I either wrap up (a particular

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The average American worker has fifty interruptions a day, of which seventy percent have nothing to do with work.

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The individual with whom you're setting the boundary has two choices: she can honor your boundary or be unreasonable and disruptive.

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project on a particular date) or delegate some of my other duties. Will you help me design a way to fit this project in?

...or...

This project sounds like it will be valuable to the company. I don't feel I'm the right person for this project because (state your reasons, be they workload, aptitude, or interest). I can (make an offer, only if you wish, to make a contribution). Will you please assign the project to someone who has the skills, time, and interest to carry this project forward successfully?

Practice using the language of tactfully saying "no." As you get better at extending boundaries, you will feel more comfortable doing so and others will respond positively.

## **Tuesday:**

Setting professional boundaries

Think about how productive you are when you are working alone, uninterrupted. Don't you get a lot more done before 8:00 am in the office, when you're working at home alone, when you're behind a locked door, or when your phone is on "do not disturb"?

The aim of setting professional boundaries is to establish a force-field around yourself so that you can be comfortable, productive, and balanced in your work. If you set effective boundaries, others will not interrupt or disrespect you, and they will learn not to make unreasonable demands of you.

Some common ways that people with weak boundaries lose energy and time include:

- Friends and co-workers stop by your desk to gossip
- Family members call or visit at inappropriate times
- Employees, bosses, or co-workers abdicate responsibilities to you
- New projects are piled onto an already over-full plate
- Clients impose arbitrary and unreasonable deadlines
- Suppliers deliver less than they promise or charge more than is warranted

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*The effectiveness of work increases according to geometric progression if there are no interruptions.*

~ Andre Maurois

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If you set effective boundaries, others will not interrupt or disrespect you, and they will learn not to make unreasonable demands of you.

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As you go through your work week, pay attention to where you lose energy and when your focus is broken. Set stronger boundaries with the people around you. The following example may help:

A client tells you he wants a project wrapped up by a certain date in the all-too-near future. You respond,

I understand the importance of completing this project. Our aim is to provide you and all our other customers with outstanding value and service. As I look at my schedule and other commitments to customers just like you, I can commit to completing this project on (name a mutually reasonable date). I will also commit to (anything else you see as feasible, reasonable, and useful for the schedule change). I ask that you agree to that date.

The last sentence of this request is the most important. A boundary must include a direct request that invites agreement. Appeal to the other person's reasonability and be absolutely reasonable yourself, and your boundaries will be successful.

**Action:** What professional boundaries do you need to set?

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**Wednesday:**

Setting boundaries in personal relationships

Protecting ourselves from the people we love is just as important as setting boundaries with people at work. Boundaries can be a tool to educate people who care about you so that they can take great care of you. You also enable the people you care about to teach you to care well for them.

There are myriad of ways to set boundaries with people in your personal life. Some examples include:

- Saying "no" to invitations or requests you don't really want
- Speaking the truth, even when it's uncomfortable

*Other people's interruptions of your work are relatively insignificant compared with the countless times you interrupt yourself.*

~ Brendan Francis

Protecting ourselves from the people we love is just as important as setting boundaries with people at work.

- Telling people how you really feel, both positive and negative
- Asking for more physical space or time alone
- Requesting that people respect your opinions
- Asking that people keep negative comments to themselves
- Requesting that people not do certain things around you, such as smoking, using drugs or alcohol, or gossiping about or ridiculing others

Sometimes you may need relaxation time away from the people you live with and/or spend your free time with. Asking for this time can be awkward. The following example may support you in setting personal boundaries:

I love spending time with you and enjoy the things we do. It's important to me to keep my commitments in our relationship (or to our family, etc.). It's also important to me to take good care of myself so that I have lots of energy and caring to share. I am going to spend some time (alone, away from the family, doing a particular activity, etc.). I ask that you support me in this.

Making the statement and then asking for the support is a firm, but loving, way of establishing a personal boundary.

**Action:** Where do you need to say "no" to friends and family members in order to have the time and energy to create the life you really want?

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**Thursday:**  
 Communicating

Communication is about being clear, stating intentions, being honest, being open, understanding the other's perspective, and taking a stand for what you believe to be the truth. Communication is key to effective personal and professional boundaries. When we don't communicate clearly, others cannot know where we stand and what is most important to us.

*Your ability to communicate is an important tool in your pursuit of your goals, whether it is with your family, your co-workers or your clients and customers.*  
 ~ Les Brown

Speak clearly with clear intention and others will respect, understand, and honor who you are and what you believe.

Speak clearly with clear intention and others will respect, understand, and honor who you are and what you believe. By establishing clear communication ground rules for ourselves and those around us, we can ensure that our communications are effective. Seldom will others respect your boundaries around communication unless you also honor those boundaries in communicating with them. Powerful communication ground rules include these:

- We will not shout at one another
- We will not use profanity in our conversations
- We will tell the complete truth
- We will not put each other down with "low blows" or "subtle digs"
- We will not talk behind one another's back (honoring this standard means that you do not talk behind **anyone's** back with anyone else!)
- We will not interrupt one another
- We will tell each other how we truly feel
- We will take responsibility for what we need and ask for it directly
- We will not manipulate one another
- We will be constructive and supportive
- We will each ensure that the other feels fully heard
- We will encourage each other to say difficult things
- We will listen respectfully to others' opinions, even when we disagree

Many people have a friend or relative or co-worker who gossips and makes negative comments. As you begin to live more and more from your center, you will not want to participate in or even hear these negative conversations. Here's some language that may help you create an agreement around gossip and negativity:

I care about your feelings. I want to hear how you feel about things and to support you, and when you speak about (this other person, how bad the situation is), it takes our focus off you and puts it in an arena where neither of us can make any difference. We have two choices. We can talk about your options or we can change the subject entirely. The truth is that I am not willing to discuss or hear about (the negative subject) any more. I ask that you not talk

*Who gossips with you will gossip of you.*

~ Irish Saying

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As you begin to live more and more from your center, you will not want to participate in or even hear gossip or other negative conversations.

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about it in front of me. What would you like to talk about?

A statement of this kind will clearly communicate your caring and your firm "no" to gossip.

## **Friday:**

Experiment with boundaries

This week, you've been strengthening your boundaries. As you develop this skill, you will get better and better at letting people know what you need. Many people are uncomfortable setting boundaries because they are concerned with the way others will respond. We shy away from the direct communication required to set a boundary, and we fear a confrontation will ensue.

I hope that the language you've learned this week has helped you glimpse the possibility of communicating your boundaries in a way that others can honor with ease. Setting boundaries need not be confrontational. Even when the other person does not respond as you had hoped, remember that you made the request in order to be true to yourself. If your request is reasonable, you will be self-assured enough to stand your ground firmly and gently.

### **Action Items**

- Review the material in this section, focusing on your answers to the questions in the exercises.
- Incorporate the 10 methods for setting boundaries into your daily life.
- Make it a point to become comfortable saying "no" at work.
- Reduce your workload by 10% this week.
- Complete Balance Builder #6 to become skilled at saying "no" to a request without saying "no" to the person.

*Time is at once the most valuable and the most perishable of all our possessions.*

~ John Randolph

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Even when another person does not respond as you had hoped, remember that you made the request in order to be true to yourself.

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## MANAGING ABUNDANCE

IN the endless pursuit of wealth and all the niceties money can buy, it's easy to lose sight of the true prosperity we all can claim. This kind of abundance has nothing to do with an impressive income, fat bank accounts, fancy cars, grand houses, or any of the other things society considers signs of abundance.

It's true that a certain amount of income is necessary, and most of us enjoy having extra money to do or buy something special once in awhile. But maintaining an ever-increasing standard of living isn't enough. We crave something more and that something is a sense of fulfillment in our daily lives. The experience of fulfillment is at the core of true abundance.

Consider this: If you spent as much time thinking about increasing your internal sense of fulfillment as you do about increasing and managing your monetary wealth, in what ways would your life change?

What does your soul want? What does it need? Earlier in this book, you explored your values, those things that matter most to you. Your answers to the questions in the values section provide valuable clues to sources of abundance in your life.

Take some time to look at your values in terms of fulfillment. If you were able to fully express those values, would you experience a deeper sense of fulfillment and prosperity?

Explore the steps you can take to bring more of those things, people, and experiences into your life. And don't worry if wealth is one of your top values. Money and fulfillment are not mutually exclusive. Just be sure that the pursuit of riches doesn't crowd out everything else that matters in your life.

### What you'll accomplish in this section:

- Learn how to overcome workaholism.
- Gain the ability to create true wealth through personal reserves.
- Find ways to slow down and revitalize.

*The world is full of abundance and opportunity, but far too many people come to the fountain of life with a sieve instead of a tank car... a teaspoon instead of a steam shovel. They expect little and as a result they get little.*

~ Ben Sweetland

The experience of fulfillment is at the core of true abundance.

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**Overcoming Workaholism**

One of my coaching clients shared his concerns about the treadmill he found himself running every day of his life:

I find myself working 60 or more hours each week. I have no time or energy for anything other than work. I don't see my family, I don't have time for friends or hobbies and I feel completely overwhelmed. I want more time and fulfillment in my life. I would rather divide my time between work, nature, people in my life, and travel as opposed to oozing out meager samplings of these between work.

Does this sound familiar? It's certainly a common concern. People are working more hours than ever. They make good incomes and are able to afford more material possessions, but at the expense of their happiness and satisfaction. As a result, they become unhappy, exhausted, and creatively starved. What can be done?

Begin by simplifying your life. Look at all the things you tolerate that only serve to limit you and drain your energy. Make a goal to systematically eliminate them all from your life. Schedule an appointment with yourself this week. Mark it on your calendar and keep it as you would a regular appointment. Use that time to determine what you want from your life and what is standing in your way.

Do you need to pay off credit cards? Should you simplify your living situation? Can you incorporate a more flexible schedule so that you have more time for fulfillment? Can you take a time management or organization seminar so that you can use your time more effectively? Brainstorm and see what comes to mind. Make a plan with concrete action steps that include deadlines and follow through on them.

**Action:** List the things that limit you and drain your energy.

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*For workaholics, all the eggs of self-esteem are in the basket of work.*

~ Judith M. Bardwick

40% of working people skip breakfast. 39% skip lunch. Of those who take a lunch break, 50% allow only 15 minutes of less.

Identify all the things you tolerate that only serve to limit you and drain your energy. Make a goal to systematically eliminate them all from your life.

**Action:** How will you eliminate the items on the above list from your life?

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Get support. Talk to friends and colleagues to see if they are going through the same situation and help each other brainstorm solutions. Enlist the support of a coach to help you set and achieve practical goals and regain balance.

**Action:** What friends or colleagues might be experiencing similar issues and be willing to brainstorm solutions?

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*Not what we have but what we enjoy, constitutes our abundance.*

~ Epicurus

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Talk with friends and colleagues or enlist the support of a coach to help you set and achieve practical goals and regain balance.

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**BALANCE BUILDER #7:**  
**Build True Wealth through Personal Reserves**

You can create a reserve of money, a reserve of love, and reserve of health. Personal reserves are your storehouses of serenity, strength, and abundance. Anything that you can have, you can have in a quantity that exceeds your needs. Why bother to stockpile that much? It's important to have more than you need because that security helps you slow your pace to the speed of your spirit. When you create reserves, you allow your true self to come forward and dance with life.

You can create a reserve of money, a reserve of love, a reserve of health, a reserve of bath towels.

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Building reserves is a way of building a safety net in your life. Having a reserve protects you in little ways by eliminating frustration. When you have extra batteries, toilet paper, cooking staples, and a full gas tank, you're free to enjoy your day.

And in bigger ways, reserves provide a cushion against the inevitable blows of life. The loss of a loved one or a job will not devastate you nearly as much if you have more health, love, money, and peace than you need. This module will guide you to recognize, build, and protect the reserves in your life.

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

**Monday:**

Where do you have reserves?

To feel the fullness and inner peace that comes with having reserves, you have to recognize the reserves in your life. There are probably places in your life right now where you have more than enough. Perhaps you buy your toothpaste at a warehouse store so you have three big tubes, a year's supply. Or if you have a circle of five friends, any of whom you could call in the middle of the night, you have a reserve of support. These "localized" reserves are areas in which you've already practiced having more than you need. Take time now to acknowledge the abundance in those areas. Find the "extra" in your life now.

**Action:** In what areas of your life do you currently have reserves?

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As you're looking, create a list of new ways you'll gather a reserve. This list has the power to create more time, energy and freedom in your life.

**Action:** What are some new ways you'll gather a reserve?

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**Tuesday:**

Build and protect reserves

To build a reserve, add to what is working well for you. The more you add, the stronger you feel. For example, by exercising and eating well daily, you prevent major diseases as well as common illnesses. When you do get sick, you will recover faster because you have a reserve of strength because you took care of yourself physically.

Building a reserve at work can help you in times of work-related stress. If you have a daily practice of taking breaks, cultivating a calm mindset, and staying highly organized, then a professional emergency will not overwhelm you because you have a reserve of strength built through self-care.

Building your reserves is not enough, however. Once you create a reserve, you must make sure it's safe and well-protected. Unless you remove the things in your life that steal your abundance of time, money, and energy, all the good things you put into your life will fall back out. So remove the things in your life that detract from your reserve.

The things that eat away at your reserves include reckless spending; using drugs like adrenaline, caffeine, nicotine, or alcohol; lack of exercise; having people in your life who hurt you or don't honor who you are; and procrastination. If we fail

*If money is your hope for independence you will never have it. The only real security that a man will have in this world is a reserve of knowledge, experience, and ability.*

~ Henry Ford

Unless you remove the things in your life that steal your abundance of time, money, and energy, all the good things you put into your life will fall back out.

to protect the zone of strength and serenity that surrounds us, all the viruses and toxins in the world sap us of our energy and peace. To have a reserve, you must know yourself well and honor that knowing.

**Action:** Where in your life do you NOT have MORE than you need? These are the places where you currently do not have a reserve.

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**Action:** Identify one area to build a reserve. Begin adding to your reserve and eliminate one thing you've been doing that kept you from having a reserve in this area.

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**Action:** What are some of the things that might be eating away at the reserves you do have?

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**Wednesday:**

Don't just spend. Invest!

The distinction between investing and spending is obvious in the financial arena where people who invest their income grow their net worth and people who spend all they make have nothing to show for it. But have you ever looked at yourself as an investor of energy? Of creativity? Of time? In these arenas, too, you can choose to spend or to invest.

A time-spender will do her best to get tasks done. A time-investor will stop "doing" in order to plan a streamlined course of action or automation so that her tasks get done in less time. That leaves her with a reserve! An energy-spender

*If you want to be truly successful invest in yourself to get the knowledge you need to find your unique factor. When you find it and focus on it and persevere your success will blossom.*

~ Sidney Madwed

A time-spender will do her best to get tasks done. A time-investor will stop "doing" in order to plan a streamlined course of action.

puts off a conversation that he anticipates will be difficult. But during the time he's procrastinating, he's leaking... or spending...precious energy. The energy-investor would communicate immediately so as not to pay the costly "late fees" of putting off the conversation. Shift some of your spending over to investment today and enjoy the reserves you'll have tomorrow.

**Action:** How do you invest? Where do you spend?

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**Thursday:**

Get bored

Many people are afraid to allow boredom to enter their lives. They actually avoid having a reserve of space, peace, and freedom because they're hooked on the adrenalin rush of speeding from place to place. Are you one of these people?

To create reserves, you must slow down enough to create space between your activities and space between your thoughts. Once you begin to experience a reserve of space, your fear of boredom will subside. That quiet feeling of resting between appointments is far more comfortable and more sustainable than the agitated feeling of running from one to the next.

Space gives us the freedom to choose, be, and create. When we have a vast feeling of space in our lives, we are more open, clear, and focused on how to treat ourselves well and obtain what we most need in life. Here are some ways to create space in your life:

- Take breaks at work.
- Take more vacations.
- Take "well" or "mental health" days for yourself.
- Underpromise yourself.
- Lower expectations.
- Clean your closets, home, car, or work space.
- Take time for walks in nature.
- Make time for meditation and to feel at peace.

*A certain power to endure boredom is essential to a happy life. The lives of most great men have not been exciting except at a few great moments. A generation that cannot endure boredom will be a generation of little men.*

~ Bertrand Russell

To create reserves, you must slow down enough to create space between your activities and space between your thoughts.

**Action:** How can you create more space in your life?

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*Nothing is secure but life,  
transition, the energizing  
spirit.*

~ Ralph Waldo Emerson

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**Friday:**

Tap into the Universal Reserve

Amassing reserves of essential supplies, money, time, and energy will help you feel safe, serene, and able to meet life head on. We highly recommend making changes in your life that will help you build these reserves in the human plane.

In an over-arching sense, however, none of these reserves is truly necessary. When you cultivate a connection with your higher self, with the universe, with God, with Buddha, with Jesus, with Moses... whatever you see as a source of abundance, inspiration, and peace, you can feel still inside and know that all's right in your world. And that's what reserve is all about!

Strengthen your spiritual sense of reserve through meditation, prayer, reading sacred or inspirational texts, or communing with nature. Know that you are making deposits into an account that you can live on for the rest of your life.

**Action:** How can you cultivate a connection to a source of abundance, inspiration, and peace?

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Amassing reserves of essential supplies, money, time, and energy will help you feel safe, serene, and able to meet life head on.

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## **BALANCE BUILDER #8: Slow Down and Revitalize**

Most people have a sense of running in fast-forward mode much of the time. We summon our courage and stamina and plow through our activities. We disregard our own energy limitations, taking on more and more. And we get a lot done. In the long run, however, ignoring our energy needs will only undermine our physical health, relationships, and peace of mind.

This Balance Builder is designed to help you recognize your own energy levels and take gentle, effective care of yourself. This starts with awareness. In order to know when your batteries are low, you need to pay attention to where you are and what you need. This week, try to recognize the times when your energy is low. Once you begin to see your own energy fluctuations, you will be able to replenish your reserves and stay on top of the game.

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

### **Monday:**

You know your energy is low when...

How do you know when your batteries are low? Consider the following warning signs:

- Frequent yawning
- Feelings of overwhelm
- Snapping at and reacting to others
- Frustration and irritability
- Tightness in your chest
- Your hands clench the steering wheel or your pen
- Shallow breathing
- Slight headache
- Sending very short e-mails, voice mail messages, or memos
- Forgetting a loved one's birthday
- Intense hunger without any intention of going to lunch
- Frequent colds
- Massive multi-tasking

*He who undertakes too many things at once seldom does any of them well.*

~ Dutch Proverb

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In the long run, ignoring your energy needs will only undermine your physical health, relationships, and peace of mind.

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**Action:** What are the physical, mental, and emotional signals that tell you that you need to slow down and recharge?  
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*They say a person needs just three things to be truly happy in this world: someone to love, something to do, and something to hope for.*  
~ Tom Bodett

**Tuesday:**  
False replenishers

It's mid-morning. You need something. What will you reach for? A cup of coffee? A candy bar? No! A bagel. Or will you go talk with a buddy in another department? Go to the restroom for the third time? Grab a cigarette? A can of Coke?

There are quick, healthy ways to re-establish energy that won't end up draining you in the long run.

You check your e-mail. You check your voice mail. You check in with your sister. What else can you do besides work?

These and dozens of other pick-me-ups are used by people day after day... and we often think that we have an eating problem or are irresponsible employees or simply doing what we have to do to get through the day. The fact is that these are all numbing or distracting behaviors we use when we aren't paying attention to our own energy level. It's perfectly natural for your energy level to rise and fall throughout the day. And there are quick, healthy ways to re-establish energy that won't end up draining you in the long run.

Today, identify your "false replenishers". Where do you turn when your energy is low? To mindless eating? To frantic activity? To idle socializing? Tomorrow, we'll look at true replenishers.

**Action:** What are your favorite false replenishers?  
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**Wednesday:**

What truly recharges you?

Healthy ways to recharge include meditating, a walk outside, lunch away from your office, talking to a close friend who supports you, going to the gym, or taking a hike. Some of the things that replenish you might not replenish other people, and that's fine. Make a list of your own unique ways of replenishing your batteries. Make sure that none of the items on your list cost you. For instance, watching TV is relaxing, but there is an addictive quality to it.

**Action:** What are the things that give you energy without any negative side effects?

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Keep your list available. Tap into it, expand on it, and USE it. DO the things that replenish you on a regular basis and they will become healthy habits.

**Thursday:**

Recharge every day

If you had one hour today to revive yourself, what would you do? GO DO IT! Not just today. Every day. At the very least, recharge your batteries for at least an hour each day, all at once or in several shorter stretches. Each week, spend at least a few hours doing something relaxing, creative, or in solitude to refill your tank. One day out of each month will give you the reserve of energy you need to pursue your dreams. And, once a year, revitalize yourself by giving your energy the gift of a week-long tune-up.

When you're rolling along, filled with energy, you won't feel the need to replenish. But that's just the time to schedule an activity that will recharge you. Bob Proctor says, "Your dreams are going to require every ounce of energy you have." By the time you're drained and down, you won't be able to "push the car to the station" to refill.

*What people need and what they want may be very different.*

~ Elbert Hubbard

Replenishing yourself regularly is not optional if you want to lead a long, healthy, joyful life.

Replenishing yourself regularly and generously is as important as planning the marketing for your business or the maintenance on your car. It is not optional if you want to lead a long, healthy, joyful life. You're replenishing the life force that feeds all your activities. You can't do anything without your energy!

*People who cannot find time for recreation are obliged sooner or later to find time for illness.*

~ John Wanamaker

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How will you replenish your energy each day?

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Schedule an hour each day for the next week to use for replenishment. Plug it into your calendar as you do any important appointment.

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Each week?

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Each month?

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Each year?

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**Friday:**

Ideas for revitalizing yourself

Today, make sure to give yourself that hour for replenishment. Also schedule an hour each day for the next week that you will use for replenishment. Plug it into your calendar as you do any other important appointment. And start thinking about your monthly and annual renewal retreats.

## Here are some great ways to revitalize yourself:

### 30 seconds:

- Take three deep, conscious breaths
- Rub your bare feet on the floor
- Look out the window and listen to the birds or other soothing sounds
- Read an inspiring quote and breathe deeply
- Look at a picture of a loved one or read an inspiring quote

### 20 minutes to one hour:

- Sit in silence with your eyes open or closed – focus on your breathing and allow thoughts to pass by
- Take a slow walk, noticing your breathing and the sights and sounds around you
- Eat a snack or meal slowly, smelling, tasting, and seeing each bite with full awareness
- Put on a favorite upbeat song and dance around your home or office
- Put on a favorite relaxing song and breathe out all your tension
- Sit silently and picture yourself surrounded by white light
- Get a massage

### Day-long:

- Spend an entire day alone or with someone else who's ready to replenish. Relax and breathe deeply, and consider declaring the day a day of silence.
- Go for a hike or walk in nature
- Go to a park or beach and watch children play
- Take a painting or poetry class
- Go to a museum or concert
- Spend time with your family with no outcome in mind

### Week-long:

- Attend a meditation retreat
- Take a vacation on a tropical island
- Volunteer for Habitat for Humanity, helping to build houses for low-income families
- Take a multi-day backpacking trip in the wilderness
- Visit a beautiful new place you've never been
- Spend a week at home, with no agenda

*Play needs direction as well as work.*

~ Elbert Hubbard

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Select several revitalizers and write them on your calendar ... in INK!

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Select several revitalizers and write them on your calendar ... in INK!

### Action Items

- Review the material in this section, focusing on your answers to the questions in the exercises.
- Identify any workaholic tendencies and eliminate them.
- Complete Balance Builder #7 by creating reserves in every area of your life.
- Reduce your dependence on your own reserves by tapping into the Universal Reserves.
- Complete Balance Builder #8 and schedule daily, weekly, monthly, and annual revitalizing activities.

*A man must be master of his hours and days, not their servant.*

~ William Frederick Book

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## MANAGING YOUR WORK/LIFE BALANCE

YOU can have beautifully crafted goals and action plans. You can create meaningful to-do lists and always work first on your most important priorities. You can plan for efficiency, use every minute productively, and diligently avoid time traps. And you can still fall short of your goals and never quite realize your dreams. Why?

Possibly because your life has gotten out of balance. Setting goals and creating action plans, managing your time, and managing outside influences are important steps in achieving what you want in life. But maintaining balance is crucial. Without balance, no matter how successful you are in one area of your life, stress and dissatisfaction will eventually creep in and affect every area.

### What you'll accomplish in this section:

- Analyze the eight areas of your life using the Circle of Life assessment.
- Learn to balance work and play in your life by getting in touch with your needs.
- Stop chasing life and start embracing it.
- Develop a "balanced" attitude.
- Make fun a lifelong priority.

*I get up every morning determined to both change the world and to have one hell of a good time. Sometimes, this makes planning the day difficult.*

~ E.B. White

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In the last 20 years, working time has increased by 15% and leisure time has decreased by 33%.

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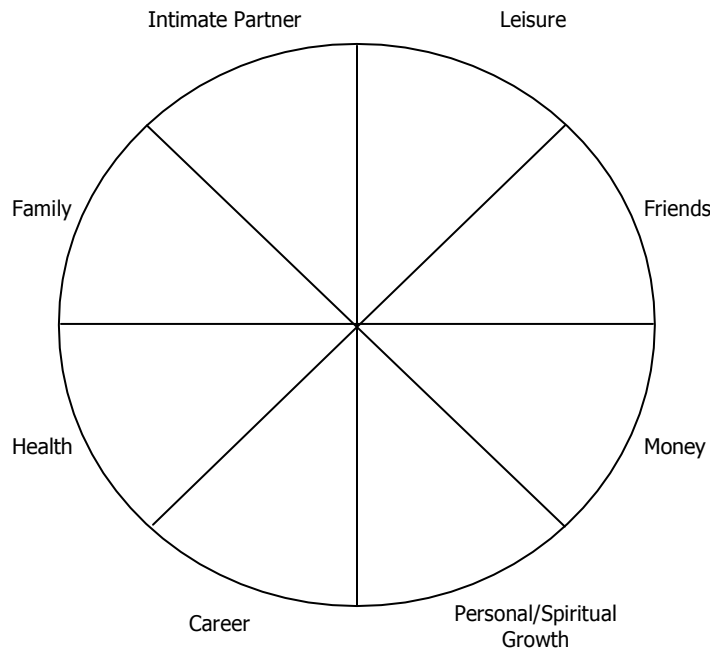
### Circle of Life Assessment

There are eight primary sections in your circle of life. The life domains include health, money, family, friends, intimate partner, leisure, personal/spiritual growth, and career.

Viewing the center of the circle as zero and the outer edge as 10, fill in the pie to show where you think you are in each life domain, using a scale of 1 to 10 (1 represents not satisfied and 10 represents true happiness).

*I still find each day too short for all the thoughts I want to think, all the walks I want to take, all the books I want to read, and all the friends I want to see.*

~ John Burroughs



There are eight primary sections in your circle of life, including health, money, family, friends, intimate partner, leisure, personal/spiritual growth, and career.

**Action:** Select one segment of the pie chart to begin analyzing today.

For example, if the segment on leisure generates the thought, "I don't do anything for fun because I don't have any time," start by tallying the time that is already dedicated to necessary activities. For instance, include eight hours a day for

sleep and eight hours a day for work. Factor in commuting time and mealtimes. After you total the time for those necessary activities, how many hours a day are left over?

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*It's never too late to be what you might have been.*

~ George Eliot

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Now seriously examine how you spend that remaining time. Are you using segments of available free time doing something you enjoy? Try listing leisure activities you regularly enjoy in the pie chart. If you come up with a great number of activities, your score in this segment will probably be higher. If you don't come up with any at all, your score will be lower.

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Review the activities you do and decide how satisfied you are with your leisure time.

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Review the activities you do and decide how satisfied you are with your leisure time. Mark the pie chart accordingly and move on to the next segment. As you go through those segments, you'll begin to see how best to use your time and create a life around what is most important.



**Balance Work and Play**

Your life and work are an integral whole. You are more than just someone who works. You have many roles in your life: friend, family member, community member, significant other, parent, and more. You have mental, emotional, spiritual, and physical needs. How well are you balancing your roles and your needs?

*The time you enjoy wasting is not wasted time.*  
~ Bertrand Russell

Take time to honor your needs, create calmness in your day, and renew your spirit. You will find that by focusing on cultivating more balance in your life, your work life will improve. You will be more relaxed, better able to focus, and better able to produce high quality work. Coming from a strong personal foundation will increase your professional abilities and improve your view of your work.

You are more than just someone who works. You have mental, emotional, spiritual, and physical needs. How well are you balancing your roles and your needs?

Begin by considering your personal and professional roles and how much time you spend each week on each role. Examples of personal roles are: mother, father, sister, brother, best friend, confidant, daughter, son, mentor. Examples of professional roles include: employee, manager, mentor, team member, and leader.

**Action:** List each role in your life and, for one week, carry around a small notepad and jot down how much time you spend on each role.

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Next, review your needs in each of these areas: mental , physical, emotional, and spiritual.

- Examples of mental needs: intellectual stimulation, diversity of thought, learning
- Examples of physical needs: food, shelter, water, exercise
- Examples of emotional needs: love, belonging, security
- Examples of spiritual needs: meditation, religious/spiritual practice on a regular basis, rituals

Consider how much time you spend in each area and note which areas you'd like to spend more time on.

**Action:** List your mental needs.

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**Action:** List your physical needs.

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**Action:** List your emotional needs.

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**Action:** List your spiritual needs.

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Next, look at how you can make room in your life to focus on the needs that have been neglected and the roles you want to expand. What extraneous tasks can be eliminated from your life or delegated to someone else? Schedule time for yourself and treat it like any other appointment.

**Action:** What tasks can I eliminate or delegate?

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**Action:** When will I schedule time for myself?

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A recent study of more than 50,000 employees found that two out of every five employees are dissatisfied with the balance between their work and their personal lives. Bruce Katcher, the study's author, says that the lack of balance is due to long work hours, changing demographics, more time in the car, the deterioration of boundaries between work and home, increased work pressure and workload.

Look at how you can make room in your life to focus on the needs that have been neglected and the roles you want to expand.

## **BALANCE BUILDER #9: Stop chasing and start embracing**

One of the things that stops people from enjoying a balanced life is coming from a place of lack. We spend energy, time, and resources trying to own enough, know enough, grow enough, and take enough action. We hope this frenzy of gathering will some day bring us peace. Instead, it throws us out of balance. We can step off this futile wheel of chasing by coming from a place of wholeness rather than lack, recognizing and embracing the abundance already available to us.

Each day this week we will suggest a different way that you can shift from a place of lack to abundance. Each shift will bring you more into balance and peace.

First, ask how you would do things differently if you truly believed that you were fully complete just as you are. Then, keep a list of the times you catch yourself striving. Your list might include buying things to make yourself feel better, gathering more information to increase your knowledge, fixing a perceived character flaw, or constantly asking questions to try to gain certainty. Nothing is inherently wrong with any of these, but be aware of the energy you expend in the pursuit of knowledge, growth and material abundance. By being aware of where you are striving, you can free yourself from this endless pursuit of "enough" and enjoy your life.

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

### **Monday:**

In pursuit of the crystal ball

We always want to know what is going to happen, but we can't. What we can know is that we will handle it, no matter what unfolds. Most of us say we want an interesting life, but our craving for certainty causes us to settle for mediocrity instead of pursuing our dreams. This need to know holds us back. Because our situations are never certain, we decide not to take risks. The discomfort we experience by not taking a risk seems less intense in our minds than the pain of walking into the unknown. So we avoid change and become limited to the familiar.

*We must not allow the clock and the calendar to blind us to the fact that each moment of life is a miracle and mystery.*

~ H.G. Wells

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Most of us say we want an interesting life more than a predictable one, but our craving for certainty causes us to settle for mediocrity rather than pursue our dreams.

Creating your own certainty means knowing that whatever happens, you can handle it. While circumstances may be beyond your control, your response to them is completely within your control.

The next time you resist change, whether it's a new job, business opportunity, or relationship, ask yourself:

- What am I afraid will happen?
- What are the chances that what I fear really will happen?
- What will I do if it does happen?

By going through these questions, you will discover that you can handle even the outcomes you fear and you can create your own sense of certainty in the face of change.

## **Tuesday:**

Information gathering

We believe we don't know enough. This may not be a conscious belief, but we express it through our constant gathering of information.

**Action:** Answer the following questions.

- How many books do you buy each month? \_\_\_\_\_ Do you read them all? \_\_\_\_\_
- How many magazines and newspaper subscriptions do you have? \_\_\_\_\_
- How often do you watch, read, or listen to the news each day? \_\_\_\_\_
- How many workshops or seminars have you attended in the past year? \_\_\_\_\_
- How many items are on your list of "skills I need to develop", personally, professionally and socially? \_\_\_\_\_

Your answers may point you to the ways you collect information in an attempt to "know enough." Yes, you are learning, but if you don't know enough already, you never will.

The quest for more knowledge limits your ability to connect with what you already intuitively know. People gather information in an attempt to find "the answer" outside themselves, but by simply tapping into your own bank of knowledge, you can find your own original and powerful ideas.

*Information is not knowledge.*

~ Albert Einstein

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We believe we don't know enough. This may not be a conscious belief, but we express it through our constant gathering of information.

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Besides the benefit of becoming acquainted with your own inner knowledge, you'll be free from reliance on outside sources. Your creativity will expand and you will think outside your box instead of seeking other's pre-packed answers.

**Action:** What outside sources of information will you release yourself from this week?

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**Wednesday:**  
Physical possessions

We try to create a sense of security by surrounding ourselves with physical possessions and the trappings of material success.

- Do you buy all the latest electronic gadgets to keep up with others in your industry?
- Do you buy the latest clothes each season?
- How often do you eat out?
- How often do you purchase "something new" for the house?
- What percentage of your annual income is tied up in auto related expenses?
- Do you "treat yourself" by spending money?

**Action:** What possessions do you use to give yourself a sense of security?

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The media and advertisers encourage us to meet our personal needs through consumption. Nearly everyone gets caught by this trap in some way.

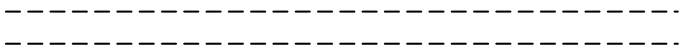
**Action:** How can you break the "I don't have enough" pattern?

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*In this materialistic age a great many of us are possessed by our possessions.*

~ Peace Pilgrim

We try to create a sense of security by surrounding ourselves with physical possessions and the trappings of material success.



The next time you find yourself gathering goods in an attempt "to have enough," let this be your reminder to stop and enjoy the abundance already in your life.

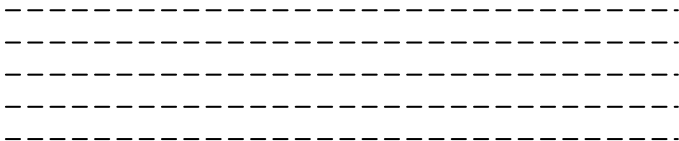
**Thursday:**

You're enough

When we don't feel that we are great just the way we are, we try to learn, develop, heal, and grow to become what we think we are supposed to be.

- Do you compare yourself to other people?
- Do you beat yourself up for having personal shortcomings?
- Do you constantly strive to improve yourself?
- Do you set higher and higher goals to prove your worth?
- Is there always some new skill or aptitude you are trying to develop?

**Action:** What are the ways you tell yourself that you are not enough?



While improvement is an important and satisfying way of life, feeling compelled to make up for some perceived lack within yourself robs you of your peace. The next time you catch yourself thinking or saying, "I just have to develop ...", "If only I were good at ...", "When I finally achieve ...", stop and recognize that you've been compelled by a fear that you might not be enough.

Instead of working to prove that you are enough or working to become enough, strengthen your awareness that you ARE enough. One way to connect with your wholeness is by sitting in meditation. Quiet your mind and body. As you breathe in, become aware of the higher power, what some call the Divine, Spirit, or God. As you breathe out, feel your connection to this infinite source. As you breath in and out in this way, you will recognize your wholeness. Practice this

*It isn't what you have, or who you are, or where you are, or what you are doing that makes you happy or unhappy. It is what you think about.*

~ Dale Carnegie

Instead of working to prove that you are enough or working to become enough, strengthen your awareness that you ARE enough.



simple meditation each time you find yourself striving to create the wholeness that already exists.

**Friday:**

Doing or being

We fill our days and nights with our constant doing, crowding out peace of mind and space to reflect on our accomplishments and plan for the future.

- Do you find you aren't able to sit down and relax?
- Do you have a perpetual mental checklist of things to do?
- Do you schedule appointments or activities back-to-back so you are always rushing?
- Do you take pride in being able to do more than one thing at a time?
- Do you find yourself starting a new project before having finished the last one?

*We're so engaged in doing things to achieve purposes of outer value that we forget the inner value, the rapture that is associated with being alive, is what it is all about.*

~ Joseph Campbell

We fill our days and nights with our constant doing, crowding out peace of mind and space to reflect on our accomplishments and plan for the future.

**Action:** In what ways do you turn yourself from a human being into a human doing?

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The habit of doing will allow you to feel as if your life is full and help you believe you are achieving many things. That sense of gain, however, will come at the cost of your peace of mind and happiness.

In order to enjoy both achievement and balance, bring mindfulness and rest into your busy day:

- Schedule five minutes before every meeting or appointment to ground yourself.
- Have lunch away from your desk, preferably in a beautiful space.
- When you arrive home from a day at work, sit on the couch for the first 10 minutes and do nothing. The more difficult this is for you, the more likely it is you've become a compulsive doer.
- Rather than jumping to pick up the phone before the second ring, take a slow calming breath first.

## Improving Balance through Attitude

Your work may come from a lot of different sources and you might be supporting many different people. You're pulled in various directions without knowing why or understanding how to cope with expectations from multiple people. It's a lot to handle and makes a work/life balance seem unattainable.

One of my clients was working in the biotechnology field and over a five-year span kept moving up through the ranks, from manager to senior manager to VP. The number of responsibilities, choices, and decisions he made drastically increased. He had a lot of things coming at him and needed to make decisions quickly, but it became more and more difficult for him to make the best decisions. He had to learn what was most important, along with when to say "yes" and when to say "no." He needed to develop new skills for dealing with a never-ending stream of demands.

Whether you've been promoted or are just trying to cope with the relentless pressures of the modern work environment, learning new ways to handle it all will help you achieve that important balance. The place to start is with yourself and the way you think about the demands on you. Below are four ideas for bringing your work and life into balance by changing your attitudes about what you can, and should, accomplish at work.

### 1. Do not please everyone.

The underlying goal for many of us is to please everyone in an effort to be perceived as doing a good job. This desire, along with over-compensation, causes you to be ineffective in work/life balance and managing your time effectively.

If you try to please everyone, the one person who doesn't get pleased is you! Take care of yourself first and foremost.

### 2. Be true to yourself

You may think you gain respect from others through how much you do and how well you do it. However, a very important determiner of respect is integrity, and integrity requires being true to yourself. To do that, you must know what your truth is. What is yours? When you have too great a workload, isn't your truth to try and rebalance it? When you have too many things going on and too many projects, isn't it your job to delegate more?

*A happy person is not a person in a certain set of circumstances, but rather a person with a certain set of attitudes.*

~ Hugh Downs

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A very important determiner of respect is integrity, and integrity requires being true to yourself.

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### 3. Set high boundaries

In order to set high boundaries, you need to know what you are willing to say "yes" to and what you are willing to say "no" to in the areas of work/life balance. Do you know your boundaries so well that when you get a huge project, you won't allow them to evaporate because of the demands of the project?

Setting high boundaries will help you have a work/life balance that provides you with enjoyment, peace, and fulfillment in all aspects of your life. If you keep your boundaries strong, they will protect you and take care of you no matter how difficult, troubling, or challenging your work can become.

### 4. Set realistic (and lower) expectations for yourself.

Set realistic expectations for yourself that allow you to do less than you think you can do. If you think it will take 1.5 hours to do something, give yourself two. Do the following:

Step 1. Give yourself increased time frames to get things done.

Step 2. Increase the amount of gentleness and compassion you have for how much time you need to get things done.

Step 3. Increase your expectations of yourself so you have more room to fail and more room to succeed.

Practice these four suggestions and you'll soon see a decrease in your stress level and an increase in the quality of your work.

*Take care of your personal wants and needs. Say no, graciously but firmly, to others' demands.*

~ Oprah Winfrey

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Set realistic expectations for yourself that allow you to do less than you think you can do.

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**BALANCE BUILDER #10:  
Orient Your Life around Fun**

Have you ever met one of those people who seems to delight in the most mundane things? He cuts his food with relish, walks across a room in joy, whistles as he files papers... Do these people ever get on your nerves? Well, actually, these people are on to something! When the lightness with which they approach life is authentic and not a false front to mask some inner pain or insecurity, such people are role models for the rest of us.

Since fun should be a daily activity, this week's Balance Builder includes an assignment for all seven days of the week.

The following daily exercises are to be completed over a week's time. Mark your calendar and spend time completing the exercise for each day.

**Sunday:**  
Not fun

**Action:** What stands between you and fun?

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What's on your list of reasons for not having fun right now?

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**Here are some answers clients have given me to those questions:**

- I have a huge mortgage to pay!
- YOU try having fun trying to run a business and raise two kids with no partner to help out!
- I have a great time at home; it's just that the people in my office are so negative!

*If it's not fun, you're not doing it right.*

~ Bob Basso

Have you ever met one of those people who seems to delight in the most mundane things?

- There is no way that my list of fun things to do will ever include exercising.
- I HATE filing and dealing with paperwork, and I always will!
- I get over a hundred e-mails a day!
- My dog always needs to go for a walk when I get home.

*Life, like all other games,  
becomes fun when one  
realizes that it's just a game.*  
~ Nerijus Stasiulis

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**Monday:**

Even this

**Action:** What are some of the things you have decided are not fun?

Write them down, and title your list "EVEN THIS." The challenge offered you by these tasks or interactions is to find a way to make EVEN THIS fun. People who are playful and have fun all the time are no different from you...they have the same chores and struggles. It's just that they choose to make EVEN THIS fun.

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**Action:** Find ways to one of the "not fun" things more fun.

Could you play great music while doing it? Wear a silk bathrobe? Have someone else join you? Make up funny stories about it? Imagine you're a reporter from a foreign paper coming to document this curious event? What else could you do to make it fun? Try one or more of these lighten-up tactics. Try again until EVEN THIS is fun. Tomorrow, "make fun of" something else and keep going until it's ALL fun.

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**Tuesday:**

Bring the Big Fun back

Remember the Tom Hanks movie "Big"? Hanks played a boy whose one wish, asked of a magical fairgrounds gypsy, was to be big. "I wanna be big," he said. The humor of the

movie comes not from a kid who's too big, but from watching an adult act in a childlike, innocent way as he goes through life in his adult body. How much fun could the child you used to be have if he or she were to do your job, run your errands, and handle your stresses today?

*The creative process is a process of surrender, not control.*

~ Julia Cameron

When we were very young, every new responsibility was an adventure, a challenge, and a game. Being able to dress ourselves was a major accomplishment, and we gave ourselves heaps of credit each time we reached that goal. Tomorrow morning, as you dress yourself, celebrate your agility and good taste! From there, marvel at how well you feed yourself (hardly spilling anything!), navigate to your place of work, and conduct business. Pretty amazing! Perhaps you'd forgotten the marvel of you. Maybe these things seem commonplace and stressful and not a cause for celebration. Well, it's time to bring the Big Fun back. This week, observe all the things you accomplish each day, large and small. Pretend you're doing them for the first time, and enjoy yourself!

One of the greatest obstacles to fun is our need to be in charge of all things, with all people, at all times.

There are probably some things you truly ARE doing for the first time. How can you bring a childlike enthusiasm to learning? How can the unknown be exciting for you, rather than frightening or frustrating? Children learn computer skills quickly because they're not afraid to make mistakes and they're not invested in looking good as they learn. They simply throw themselves into the experiment. Now it's your turn to do the same!

Finally, as you would have when you were small, if you reach the end of your rope, call a time-out and rest yourself with a glass of juice and an animal cracker. Perhaps Robert Fulghum was right when he wrote, "Everything I ever needed to know about life I learned in kindergarten."

**Action:** What could you do this week to bring more fun into your usual activities?

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**Wednesday:**

Relinquish control and enjoy!

One of the greatest obstacles to fun is our need to be in charge of all things, with all people, at all times. We have high standards. We love intensely. We try to make things wonderful, to create phenomenal success. And we try so hard that we stop having fun. Does the weight of the world on your shoulders make it tougher for you to really chuckle and downright impossible for you to dance?

A party is usually more fun if you're a guest and not the host. Of course, hosting is deeply satisfying at times...but if you're ALWAYS the host and never the social butterfly, your wings get weak from not being used. Where in your life are you consistently in charge? Where could you let go of control a little for the sake of having fun? Where might things work out just fine even if you didn't iron out every detail? Open the door to fun and let it blow through your rooms. The loss of control is a small price to pay for the joy you'll find.

**Action:** In what way could you let go of control for the sake of fun?

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**Thursday:**

Prescription: Deep belly laughter

Whatever it is that ails you, there is but one solution! Norman Cousins is a remarkable man who has written about the curative powers of laughter. When he was diagnosed with a devastating illness, he decided to fight it with a sense of humor...literally! He watched funny movies, cartoons, "The Three Stooges," whatever he could get his hands on. He laughed himself well.

I pray that you do not face such a profound health challenge. But perhaps the deep belly laughter prescription is not only curative, but preventative. We've heard that "he who laughs, lasts," and I believe it. So today I invite you to create your own recipe for deep belly laughter. Is there an old friend with whom you can't help but be silly? Are there certain movies

*One should take good care not to grow too wise for so great a pleasure of life as laughter.*

~ Joseph Addison

We've heard that "he who laughs, lasts," and I believe it.

that have you rolling? What games make you laugh till your sides ache? Uproarious laughter cannot be called forth on demand, but when the conditions are right, it does seem to appear. So build those conditions for yourself soon, and regularly. Laugh long and last!

*Laughter is the spark of the soul.*

~ Author Unknown

**Action:** What is your personal source of laughter?

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What truly entertains you?  
Find out and declare it to those you spend your time with.

**Friday:**

The universe is laughing. Is it laughing at you or with you?

What if all our challenges, all the things in life that we claim we have to face with grim resolution, are actually the signs that a higher power is tickling our ribs? Julia Sweeney's one-woman show "God Said Ha!" won the Golden Space Needle for Best Picture at the 1998 Seattle International Film Festival because the Saturday Night Live alumna shared her personal story of divorce, cancer, and family challenges...some of the more "serious" circumstances one can face...with such tenderness and humor. People sometimes use the term "no laughing matter" when they speak of an issue of great import. But, perhaps, as Julia Sweeney advocates, these are opportunities to recognize the universe's marvelous sense of humor, even in the midst of our individual tragedies.

**Action:** What challenges are "tickling" you right now?

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**Saturday:**

What's your idea of a good time?

Do you know what's most fun for you? Do you do the things that are REALLY your idea of a good time? Even in our "free time," it seems that many of us simply go through the motions. "Wanna go out to dinner again?" we mumble to our partners or friends. "Howzabouta movie after?" they mutter

back. And so it goes...a string of forgettable evenings of "entertainment."

What truly entertains you? Is it an evening of "Pictionary," testing friends' ability to convey an idea despite their limited drawing skills? Or an afternoon of roller coaster rides and gooey snacks at an amusement park? Would you love to go sledding on giant inner-tubes or simply stop by a local park for a giddy romp on the swings or the merry-go-round? When was the last time you had a tickle-fest or a wrestling match? Would that be your idea of a good time?

Find out... declare it to those you spend your time with. "THAT is my idea of a good time!" Get them to join you. Find out their idea of a good time. By pursuing these truly fun adventures, you'll create not only fun but also long-lasting memories that will bring the fun back again and again.

**Action:** What is your idea of a rousing good time? \_\_\_\_\_  
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*This time, like all times, is a good time, if we but know what to do with it.*

~ Ralph Waldo Emerson

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What's your idea of a rousing good time? So, why aren't you doing it right now?

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**Action Items**

- Review the material in this section, focusing on your answers to the questions in the exercises.
- Select one area of your life that needs the most attention and get it in balance.
- Uncover your needs and find ways to fulfill them.
- Complete Balance Builder #9 and begin to embrace life instead of holding back.
- Undergo your own personal attitude lift.
- Complete Balance Builder #10 and find lots of ways to bring fun into your life.

## CONCLUSION

IF you've read every section of Time Management Mastery and have worked through the exercises, you have gained enough information and insights to manage your time and life more effectively (and with less stress) than ever before.

### You have learned:

- What matters most to you
- Where you want to go with your life
- How to create a useful action plan
- How to finish the important tasks first
- Techniques for saying yes to what you want
- The high price of wasting time
- How to plan for efficiency
- How to avoid time traps and procrastination
- Ways to budget your time and energy
- Nine schedule tamers
- Techniques for enjoying more by promising less
- Ways to plan and complete projects efficiently and effectively
- How to build a solid support system
- Methods for managing information effectively
- The lessons that resistance teaches
- Top 10 ways to set boundaries
- Four ways to say no at work
- Five ways to reduce your workload
- Methods for overcoming workaholism
- How to use personal reserves to build true wealth
- Ideas for increasing vitality by slowing down
- Ways to balance work and play
- How to stop chasing and start embracing
- Methods for improving your balance by improving your attitude
- The art of orienting your life around fun
- And more...

If you've begun to incorporate what you've learned into your daily life, you are already seeing significant improvements in several key areas.

My hope is that this is only the beginning of a total transformation that will lead to the achievement of your most vital goals and the realization of your most cherished dreams.

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