



Making Things Happen

Managing Yourself to Success



Howdy y'all!

- Texan and Texas A&M Aggie, class of '88 (whoop!)
- Wife of a field service mechanic; mother of 2 cats & a 9-month old giant puppy
- Daughter of an entrepreneur; small business lover





What is your why?

- Simon Sinek's Ted Talk, "How Great Leaders Inspire Action"
- What is your purpose?
- Set your goals based on your why
- Measure your priorities vs. your goals



Know Yourself

- Understand how YOU work best
- Hear that voice in the back of your head
- Coach, Mastermind, etc.
- Know your audience: DISC Profile
- Be realistic of what you can accomplish: Under promise, over deliver



Identify Your Clutter

- What is in your way?
- Mental clutter
- Physical clutter
- Technological clutter
- Write it down
- If in doubt, throw it out!



Setting Goals

- Decide what you want or need to achieve: “I want to work less.”
- Set goals before the year begins
- Evaluate on a regular basis
- Create new/modify old as needed



Setting Goals

- SMART Goal: “By April 30, 2016, my work hours will be constricted to between 8am and 6pm Monday through Friday, every week.”
- S = Specific
- M = Measurable
- A = Achievable
- R = Realistic
- T = Timely



Implement Steps toward the Goal

“By April 30, 2016, my work hours will be constricted to between 8am and 6pm Monday through Friday, every week.”

- Eliminate the clutter
- Learn to say no
- Manage interruptions
- Build a timeline



Setting Priorities

- Schedule your God, your family, your health FIRST
- Your why, then your goals
- Everything can't be the most important thing
- If in doubt: if it makes you money, make it the higher priority
- Prioritize individual work last (respond to and keep others moving first)



Daily To-do List

- The most overwhelmed people don't start with a plan
- Create a daily to-do list, **every day**, in priority order
- Base it on timelines for projects and goals
- Calendar
 - Review for meetings
 - Block out focus time
- Be realistic
- Work the list



Use Tools to Force Structure

- To do list (Apple Reminders)
- Project Management Software (Basecamp)
- CRM (Highrise)
- Calendar (Google, iCal)
- Process Management (Basecamp)
- FileMaker



Develop Processes

- Why are policies/processes/checklists needed?
- How can they make you more effective?
- What types of processes should you have?
- Modify them as new information becomes available



Managing Interruptions

- Deciding what can wait when interruptions occur is easier if you have a plan
- Go back to the list!
- Does it support your why and/or your goals?
- Knock it out quickly, if possible
- Mitigate it - Push it off to someone else or to another day
- Turn off your phone, email and chat/texts



Managing Email

- Schedule several times per day to go through emails
- Decision making is key
- Respond, file, junk, flag or delete
- Your inbox should be empty after every review
- Schedule outgoing emails; set up automated response

Do NOT manage your projects through email!



Reset

- Reprioritize and reschedule at the END of every day
- Remove/delete things you will never do
- Compare each pushed off to-do vs. the timeline for the full project
- Verify that what you've changed is possible to do on the day you moved it to
- Communicate in advance any change that affects a deadline or a meeting



Make Things Happen

- Clear communication with consequences to your clients!
- Remove stress
- Stop being overwhelmed
- Go forth and manage yourself to success



Questions