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Planning and Time Management

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Overview of the Day

Agenda



- Welcome and Introduction
- Time Management
- Time Management Techniques
- Learner Activity
- Break
- Time Blocking
- Time Management Processes

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Learning Aim and Outcomes

The aim of this workshop is to give participants practical knowledge, techniques, and frameworks for effective time and priority management, enabling them to plan more strategic use of their time.

By the end of this workshop, you will be able to:

1. Identify what time management is, identify its importance in a professional context, and differentiate between short-term and medium-term planning.
2. Apply at least one time management framework (e.g., the Eisenhower Matrix) to prioritize tasks and manage time more effectively.
3. Understand common challenges and myths related to time and priority management and explain strategies to overcome them.

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Time Management

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What Is Time Management?

- **Definition-** Time management is the process of planning and controlling how much time to spend on specific activities to increase effectiveness, efficiency, and productivity.
- **Purpose-** The goal is not to manage time itself (which is fixed) but to manage ourselves in relation to time, making deliberate choices about how we allocate our limited hours.
- **Balance-** Effective time management creates a healthy balance between work, personal activities, and rest while achieving goals and meeting deadlines.

Time management is as much about mindset as it is about techniques. It's about being intentional with your most precious resource and aligning your time allocation with your values and priorities.

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Time Management in Retail

- In the Retail sector where days can be hectic and tasks numerous, effective time management is essential to ensure optimal productivity and maintain a healthy balance between work and personal life.
- By maximising your productivity, planning and organising your tasks, avoiding procrastination, learning to say no, and balancing your work and personal life, you'll be better equipped to manage your time and succeed in the demanding Retail sector.

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Why Time Management is important in Retail

- **Boosts Productivity:** Prioritising high-impact duties—like assisting customers or restocking fast-moving items—keeps the business profitable and running smoothly
- **Improves Customer Service:** Organising admin work and inventory counts during slow periods leaves staff free to focus on shoppers when foot traffic peaks
- **Reduces Labor Costs:** Better scheduling and clear task tracking prevent costly overtime and reduce time spent fixing operational errors.
- **Lowers Employee Stress:** Clear daily plans and realistic workloads prevent burnout, helping stores reduce high staff turnover

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The Importance of Time Management

Effective time management isn't just about getting more done it's about creating the conditions for sustainable success and wellbeing. By mastering time management, you position yourself to perform at your best while maintaining balance in all areas of life.

- **Self-actualization-** Achieve personal and professional growth
- **Career advancement-** Demonstrate reliability and excellence
- **Stress reduction-** Minimize last-minute rushes and burnout
- **Productivity increase-** Accomplish more with the same time investment

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Short-Term vs. Medium-Term Planning

Short-Term (Operational) Planning

- Daily and weekly schedules
- Immediate task prioritization
- Meeting preparation
- Email and communication management

Focuses on execution and immediate deliverables within days or weeks.
Typically involves detailed to-do lists and specific time blocks.

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Short-Term vs. Medium-Term Planning

Medium-Term (Tactical) Planning

- Monthly and quarterly goals
- Project milestones
- Resource allocation
- Skill development initiatives

Bridges short-term actions with long-term vision. Involves breaking down larger objectives into manageable components with clear timelines.

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Short-term planning ensures daily productivity, while medium-term planning keeps you aligned with your bigger professional goals and prevents short-sighted decision making.



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Time Management Challenges

Constant Interruptions- Notifications, colleagues, and urgent requests that fragment attention and break focus

Multitasking- Attempting to handle multiple complex tasks simultaneously, reducing effectiveness at all of them

Meeting Overload- Excessive scheduled events that leave little time for deep work or task completion

Inability to Say No- Taking on too many commitments due to people-pleasing or FOMO

Procrastination- Delaying important tasks in favor of easier or more immediately gratifying activities

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Myths About Time Management

Busy = Productive

Being constantly in motion doesn't necessarily mean you're making meaningful progress. Activity without purpose often leads to exhaustion without achievement.

Multitasking Increases Efficiency

Research consistently shows that multitasking on complex tasks reduces quality and efficiency. The human brain excels at focus, not rapid context-switching.

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Myths About Time Management

Time Management Is One-Size-Fits-All

Different personalities, roles, and contexts require tailored approaches. What works for a colleague may not work for you.

Perfect Planning Eliminates All Problems

Even the best plans need flexibility. Unexpected events will occur, and rigid adherence to a plan can create more stress than adaptive approaches.

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Time Management Techniques

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Eisenhower's Box: Urgency vs. Importance

This matrix, developed from principles used by President Eisenhower, helps distinguish between what's pressing and what's truly valuable. Most professionals spend too much time in the "urgent" quadrants and not enough in the "important but not urgent" quadrant where growth and strategic work happens.



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Eisenhower's Box: Urgency vs. Importance

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Do First- Important and urgent tasks requiring immediate attention. These are crises, pressing problems, and deadline-driven projects.



Schedule- Important but not urgent tasks. These activities contribute to long-term mission, values, and goals. Schedule dedicated time for these.



Delegate- Urgent but not important tasks. These activities can often be handled by someone else, freeing you to focus on more important work.



Eliminate-Neither urgent nor important tasks. These activities are often distractions that don't contribute meaningfully to your goals or wellbeing.

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Time Management in Retail

- **Using the Eisenhower Framework – list the tasks you have this week into the different boxes…**

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The Pomodoro Technique

1

Choose a Task- Select one specific task to focus on

2

Set the Timer- Traditionally 25 minutes of focused work

3

Work Until the Timer Rings- Eliminate all distractions during this period

4

Take a Short Break- 5 minutes to refresh before the next session

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The Pomodoro Technique

After completing four Pomodoro's, take a longer break of 15-30 minutes. This technique leverages our natural attention cycles to maintain high focus while preventing burnout. The structured breaks are essential as they give your brain necessary rest and increase overall productivity.

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Learner Activity

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Time Management Processes

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Time Blocking: Structure Your Day

1

List priorities- Identify your most important tasks for the day

2

Allocate specific time blocks- Assign each priority to a dedicated time slot

3

Protect your blocks- Treat these time blocks with yourself as non-negotiables to do

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Time Blocking: Structure Your Day

Time blocking transforms vague to-do lists into concrete commitments in your calendar. This method is particularly effective for deep work that requires sustained focus. Consider color-coding different types of activities (e.g., creative work, meetings, administrative tasks) to get a visual sense of how you're allocating your time.

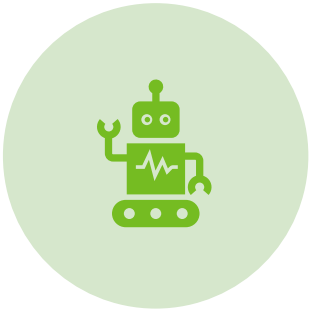


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The 2-Minute Rule



The Principle- If a task takes less than two minutes to complete, do it immediately rather than scheduling it for later or adding it to your task list.



The Science- The mental overhead of tracking, remembering, and rescheduling small tasks often exceeds the effort of just doing them immediately.



The Application- Apply this rule to email responses, quick phone calls, simple filing tasks, or brief clarification questions to colleagues.



The Caution- Be wary of letting these quick tasks interrupt deep work sessions. The rule works best during processing time, not during focused work blocks.

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The 2-Minute Rule

The 2-minute rule, popularized by productivity expert David Allen, helps prevent the accumulation of small tasks that can collectively create a sense of overwhelm. It's particularly effective for clearing mental clutter and maintaining momentum throughout the day.



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28% Time Spent on Email



28% Time Spent on Email – Knowledge Workers A McKinsey Global Institute report estimated that interaction-intensive workers (e.g., managers, professionals) spend 28% of their workweek reading, responding, or writing emails.



Harvard Business Review also cites McKinsey, stating typical professionals dedicate about 28% of their day to email this equates to around 2.6 hours daily.



Additional surveys affirm that high-skill knowledge workers similarly spend that large portion of time managing email.

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40% Perceived Productivity

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40% Perceived Productivity – Average Worker Productivity A Workfront survey found that employees spend roughly only 40% of their time on core job tasks, with the rest consumed by meetings, emails, and administrative obligations.



Interruption research by the American Psychological Association shows that task-switching "costs as much as 40 percent of someone's productive time".



The University of California, Irvine found that recovering from interruptions can take up to 23 minutes, drastically reducing time-on-task.



Together, these suggest that people spend around 60% of their time on interruptions and coordination, leaving about 40% for focused, primary work and many professionals feel that reflects their perceived productive time.

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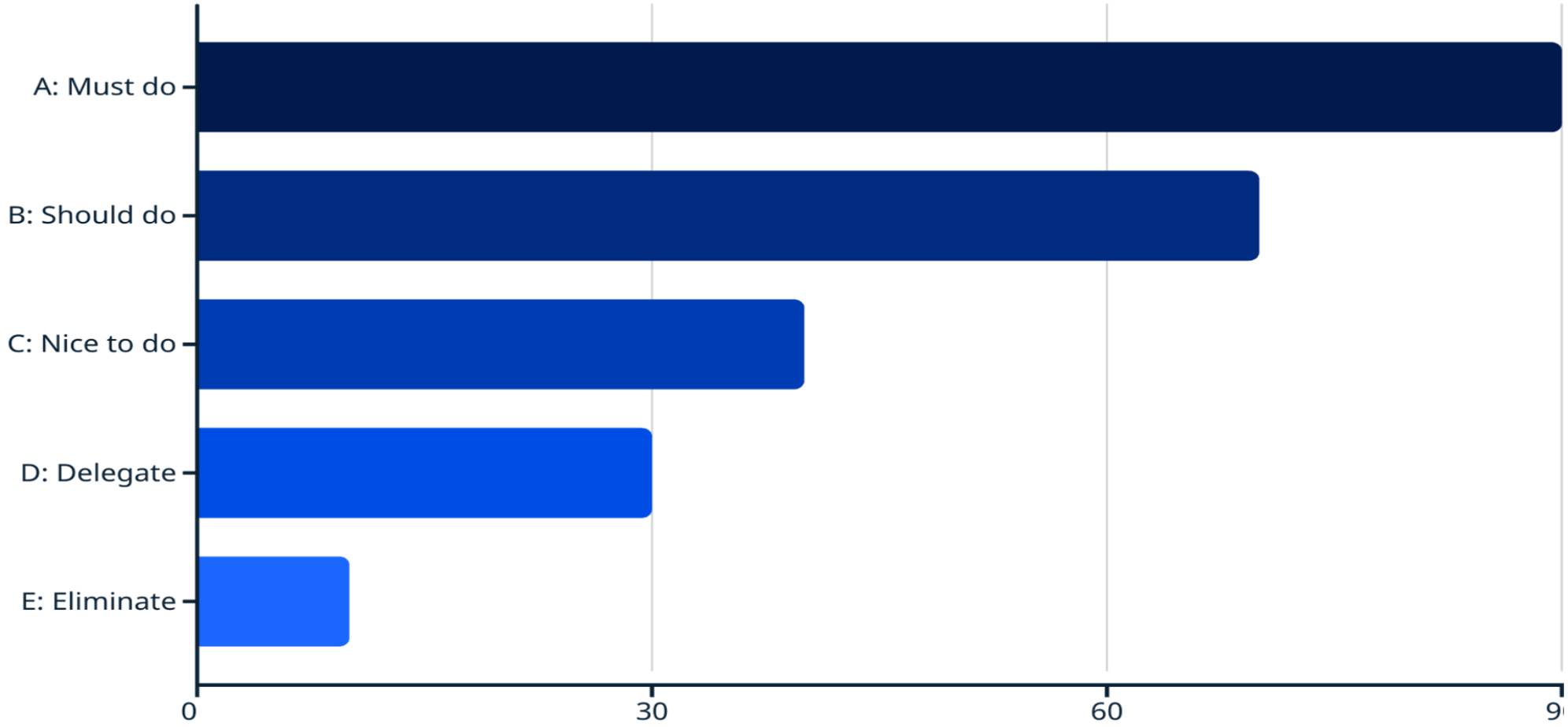
The ABCDE Method

- The **ABCDE Method**, popularized by productivity expert Brian Tracy, provides a simple framework for prioritizing tasks. Start by labeling each task on your list with a letter from A to E. Then, tackle all A tasks (in order of importance) before moving to B tasks.

- This method forces you to make deliberate choices about what truly matters. Remember that a B task, no matter how simple, should never be done before an A task is complete. This discipline ensures you're always working on your highest-value activities.

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The ABCDE Method



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The 80/20 Rule (Pareto Principle)



The Pareto Principle states that roughly 80% of effects come from 20% of causes. In time management, this means that approximately 80% of your results come from 20% of your activities. The key is identifying which 20% of your tasks drive the majority of your value.



Apply this principle by regularly asking: "Which few activities generate the most significant results in my role?" Then ruthlessly prioritize these high-impact tasks while minimizing, delegating, or eliminating lower-value activities. This mindset shift from "doing more" to "doing what matters most" can dramatically increase your effectiveness.

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Batch Processing Similar Tasks

Batching leverages the efficiency of context retention and minimizes the productivity cost of switching between different types of tasks. Each context switch can cost 15-25 minutes of reduced productivity, so grouping similar activities can save hours each week.

Consider your own work patterns and identify opportunities for batching. Even small adjustments, like checking email just three times daily instead of constantly, can reclaim significant focus time.

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Batch Processing Similar Tasks



Communication Batching- Process all emails, calls, and messages during 2-3 designated blocks rather than responding continuously throughout the day.



Administrative Batching- Group paperwork, filing, expense reports, and similar administrative tasks into a single weekly session.



Meeting Batching- Schedule meetings back-to-back on designated "meeting days" to preserve full days for focused work.

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Setting Effective Boundaries

Identify	Communicate	Maintain	Reassess
Identify Your Non-Negotiables- Determine which boundaries are critical for your productivity and wellbeing, such as no meetings before 10 AM or no work emails after 7 PM.	**Communicate Clearly-** Express boundaries professionally and confidently, without over-explaining or apologizing. Use phrases like "I'm focusing on priorities X and Y this week."	**Maintain Consistency-** Enforce boundaries consistently to train others on what to expect. Occasional exceptions undermine the entire boundary system.	**Reassess Regularly-** Review which boundaries are working and which need adjustment. Different seasons may require different protection strategies.

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Weekly Review Process

Review Completed Tasks- Acknowledge what you've accomplished and carry forward anything incomplete

Preview Upcoming Week- Review scheduled meetings and deadlines for the next 7 days

Set Weekly Priorities- Identify 2-3 key objectives that would make the week successful

Evaluate Progress on Larger Goals- Check alignment with monthly and quarterly objectives

Reset Your Systems- Clear inboxes, organize workspaces, and prepare tools

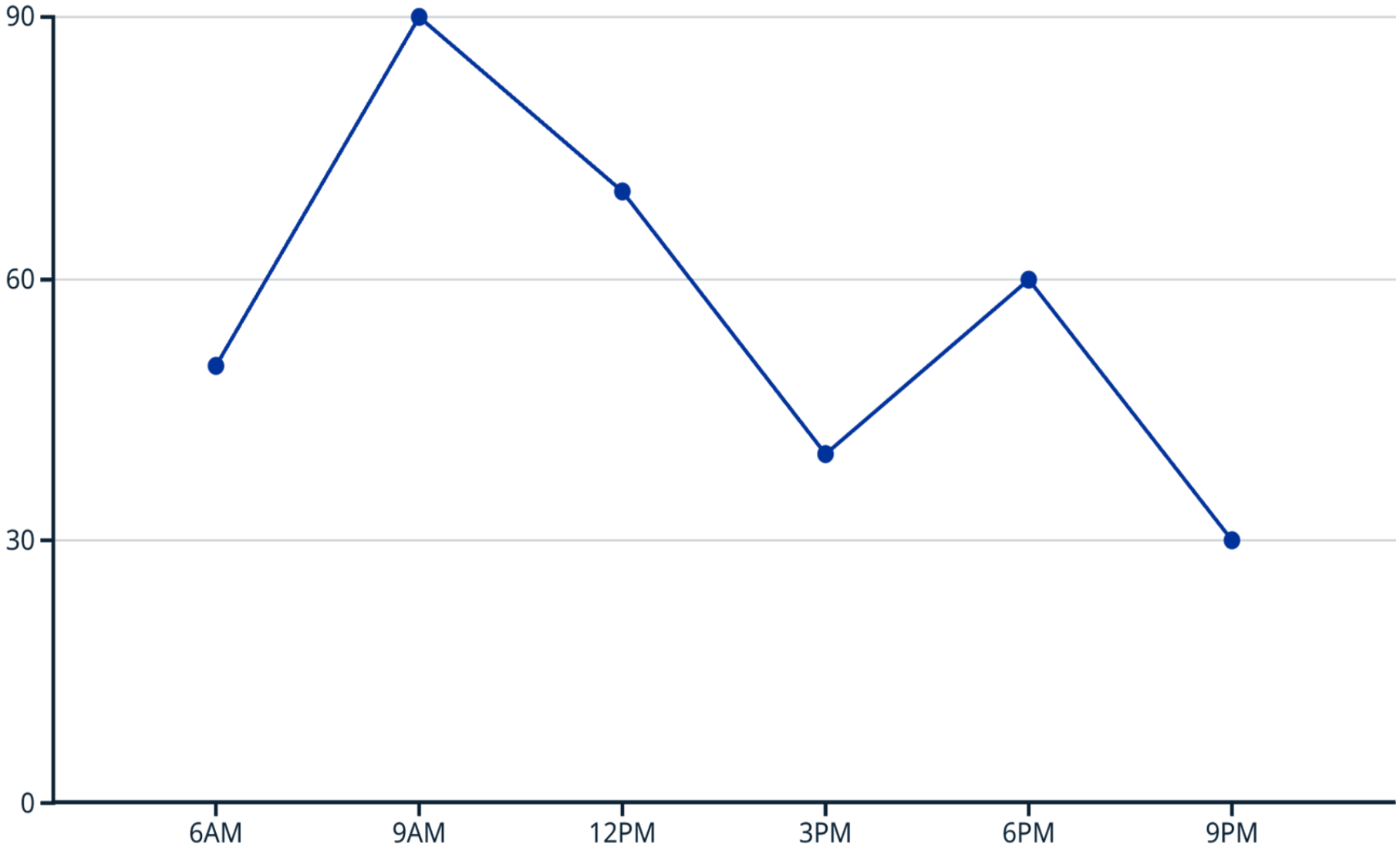
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Energy Management: The Missing Piece

- Time management alone isn't sufficient you must also manage your energy. Even with perfect scheduling, low energy will limit your effectiveness. Track your natural energy patterns for a week to identify your peak performance windows. Then align your most demanding tasks with your high-energy periods.
- Remember that energy is renewable but requires deliberate management. Regular breaks, proper nutrition, adequate sleep, and physical movement aren't luxuries they're essential productivity tools that expand your capacity to accomplish meaningful work.

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Energy Management: The Missing Piece



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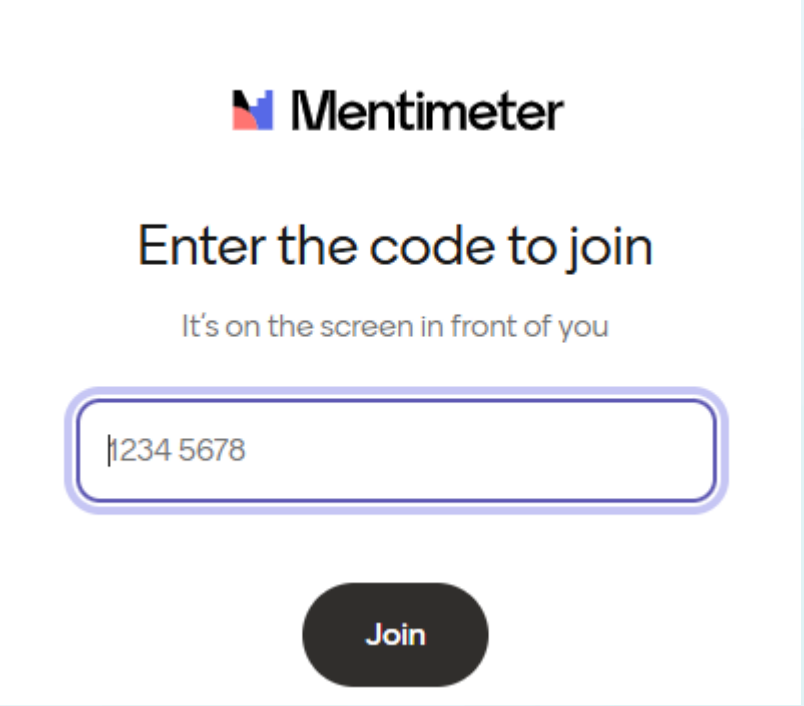
Key Strategies for Retail Time Management

- **Schedule Around Foot Traffic:** Use point-of-sale data to track busy hours, reserving quiet times for restocking and paperwork.
- **Automate Routine Tasks:** Use software to handle shift reminders, payroll, and digital shelf labels.
- **Batch Administrative Work:** Group low-priority tasks or emails into specific time blocks rather than multitasking throughout the day.
- **Involve Staff in Scheduling:** Allow shift swaps and preferred-time requests to boost morale and match staffing levels to actual customer demand.

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- Please type into your web browser menti.com and the screen shown should appear.
- Once you are on menti.com please enter the code to access the feedback questions
- Complete the feedback questions from today.



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Thank you

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