Al Gore, former Vice President of the United States

"When The Desk Cries For Help!"

Strategies and Actions on how to better organize yourself,
your workspace and your organization

(Written by Markus Vogel & Gerhard Schwandt)

Preface

The following pages contain suggestions and helpful hints on how you can better organize yourself, your workspace and your organization. These simple but powerful techniques will help improve the running of your organization and managing its resources.

There may be times, while reading through these pages, when you feel like you know this already and you are probably right. However, seeing it written down and put together in this simple booklet might give you an even better understanding of how you can use these tips in your current situation. Experience has shown that the simpler the solution the better the results.

You and your co-workers are involved in many different actions and tasks to keep your organization going and growing and most of these are working for you to a greater or lesser degree (otherwise you wouldn't be in business, right?!). These suggestions and helpful hints are meant to assist you in improving where improvement is possible and to increase your growths potential.

Have fun!

What is the Quickest Way to Reach Your Goal?

Simply stated: By not wasting time and/or energy.
(By the way, energy can be defined as money, materials and resources.)

Every task or project should have a stated, pre-determined *result* which includes what kind, amount and quality is wanted in that result. It's part of the planning steps.

Now, first and foremost, one has to make certain that this result is even accomplishable. Usually this depends on the existing procedures and systems in use, including available training, research and the organization itself. Here one talks about **Effectiveness**.

Secondly one must determine how Efficiently the result can be obtained:

The second step questions the **Efficiency** in obtaining the results: To be profitable, the overall time involved and energies used cannot be greater than the benefits attained. Normally this includes the following equation: '***The quicker the work is done and completed, the higher the efficiency'.***

Efficiency is mainly the ability of completing an action, a task or a project, etc., successfully and without wasting time and/or energy. It is also a key factor in establishing ROI (Return On Investment).

Included in this are:

1. A clear goal for your own work. This means one has to see a sense and a purpose in what one is doing, otherwise the work is meaningless and the results are wasted time and energy.

2. Correctly judging which of the things are important, unimportant or may even be an impediment in the accomplishment of the goal.

3. A high degree of organization and order which helps accomplish the work involved smoothly and in the shortest amount of time.

Personal Efficiency includes that the actions or tasks are done immediately and completely! Therefore, these rules apply:

- Do It Now!
- Do It Only Once!

Obviously, some tasks or projects do have time provisions or are so complex and involved that it is impossible to complete them immediately. In this case ask yourself: *"What is the next step?"* and do and complete those steps right away whenever possible.

The way to know if you can get a task completely done right now is in this question: *"Does it have to be touched again or not, are there additional steps to this task that can't be done right now?"*

√ Do It Now!
√ Do It Only Once!

Delegate - What?

Delegate means:

"To give a particular job, duty, right, etc. to someone else so that they do it for you."
(Cambridge Advanced Learner's Dictionary)

Unless you want to do everything yourself, you must be willing to delegate tasks, duties, rights, etc. to another or others.

Many executives do delegate tasks, but end up still doing parts or the entire task themselves, mainly because they feel that they can do it better and definitely faster than the person they'd delegated it to. Even if that is the case, it should be avoided. It interferes with the organizational set-up and can ruin employee motivation and morale, since your employee now feels that he/she is being bypassed. And what's the end result of it all? - "The executive is not getting his own work done because he's wasting his own valuable time doing the work someone else should and could be doing!"

To quote Theodore Roosevelt:

"The best leader is the one who has sense enough to pick good men to do what he wants done, and the self-restraint to keep from meddling with them while they do it."

On the other hand, one should not pass on, delegate, his/her *own* responsibilities, even though they might be bothersome, since this usually just leads to more inquiries from the person delegated to and consequently, additional work.

The tasks and duties, etc. that are being delegated should be part of that persons area of responsibility. So, always make sure that everyone knows who is responsible for what and always info when changes are being made. In other words, what are the hats (roles) of each member in the organization?!

It is important that you find the "camouflaged holes" in your organization. These are tasks that no particular person is responsibility for so you usually end up doing them. They are like stray dogs full of flees. They can appear anytime, anywhere, are very irritating and keep one from doing one's own job.

It makes a lot of sense to ***put things in writing***! Especially when dealing with important and/or complex tasks, job specifications, etc. This way you avoid misunderstandings, things being overlooked, things done wrong or completely forgotten. While it may feel a bit time consuming to write it down, look at the amount of time it took to fix it when you didn't do so. Also, add a request for a Compliance Report to all written assignments so you know the job was done!

√   Don't bypass your employee and meddle with his/her work.

√   Try not to delegate your own "bothersome" work to others.

√   Assign responsibilities and task up "camouflaged holes" in the Organization.

√   Whenever possible, *Put Things in Writing!* And get a Compliance Report back when applicable.

How do I get from "A" to "B"?

Your success depends to a very large degree on the speed with which things are processed inside your organization. Let's take a look at this simple example:

Tasks come in...	And are being addressed within the organization	Products or Services come out
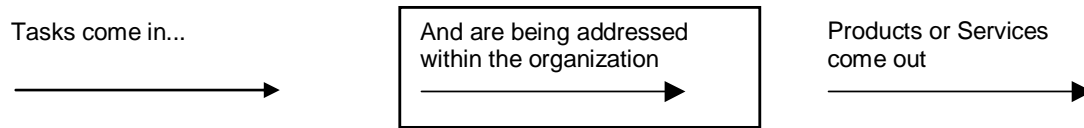
It can also happen that a task comes in and doesn't get addressed or gets only partially handled. The task gets "lost" within the organization:

Task 1

Task 2

Product or Service
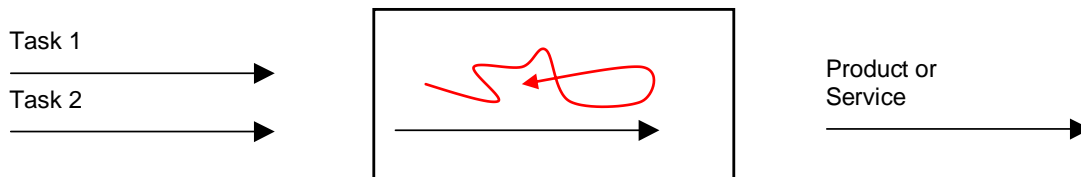
This then results in the "Yogurt Cup Syndrome". When an empty yogurt cup is tossed behind a bush, it will rarely be lonely for long. It's "brothers" and "sisters" will join it in short order: the Coke or Dr. Pepper can, the McDonald's bag or the Burger King tray, the tires and eventually the couch…

Maybe you've seen this yourself. You parked your car in a no-parking area and within minutes other cars start parking there too. Disorder spreads, incompleted tasks join other incompleted tasks and other messes join in. And so it goes.

The more tasks get "lost" in your organization, the more tasks start going the same way and you start getting a backlog of unread magazines, paperwork, bothersome tasks ignored, etc. Here you also find the paperwork that gets arranged like a card display, one layer on top of the other. Over time this clogs up and makes it harder and harder for your other tasks to get processed rapidly and to flow through your organization.

Task 1

Task 2

Task 3

Task 4

Backlog

Product or Service
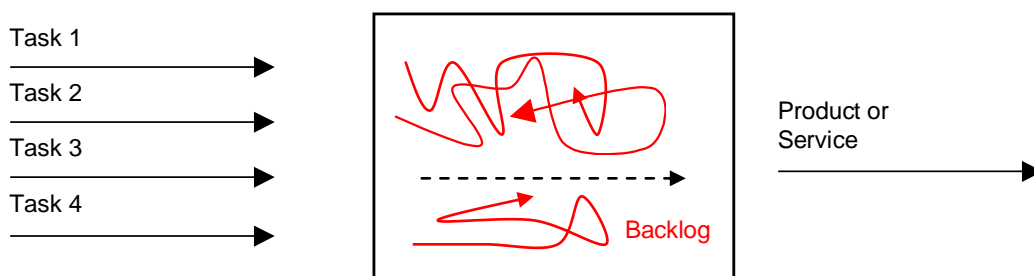
Backlogs lead to frantic activities, stress, unnecessary extra work and mistakes. It becomes harder and harder to get things done. Customers ask for their orders, complain about delivery times or simply go to the competition. Now what happens to your revenue and profit?

√ Tasks that are left undone or incomplete will allow backlogs to build up. Do not permit this to happen. Whenever possible "Do It Now and Do It Only Once"!

All Roads Lead to Rome – but how many times?

How are tasks such as letters, requests for quotes, proposals, orders, assignments, complaints, etc. normally processed? Are they picked up and processed all the way through so they won't have to be touched again? Well, not always. Sometimes it looks like this:

You start, as an example, to write a proposal.
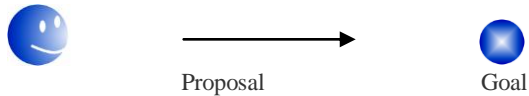
Half way through the first page you get an urgent email. The proposal is put aside and now the email gets addressed. Then the phone rings and is answered. During the phone call the assistant comes in with a letter to be signed. The letter is left on the desk. After the phone call you remember that you'd given instructions to another employee to handle an important task right away. Was it done? You get up to check on it. On the way there one is approached by another employee who wants to leave early…

Thirty minutes later you get back to the desk and take up the proposal again. Because of all the confusions encountered in the last half an hour you decide to start over at the beginning.
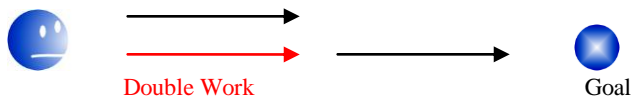
Now the assistant comes in and asks about the signature on the letter and guess what - the phone is ringing, again. After signing the letter and answering the phone you finally get back to the proposal, but because of the distractions, you have to go back a couple of paragraphs…
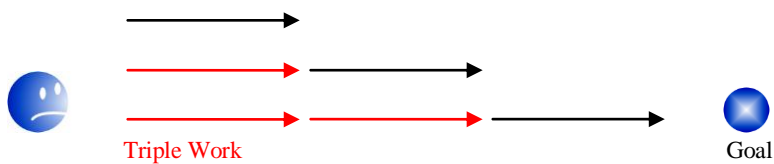
Next a co-worker steps into the office with a big problem… The proposal is put aside for another day.
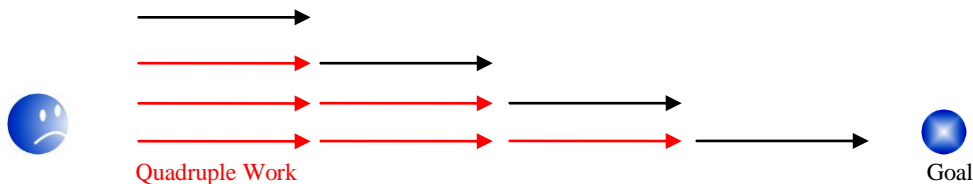
Since quite some time has passed, where does one start now? Back at the beginning again!

Studies show that the search for paper and restarting tasks take up a lot of unnecessary time. How much is one to two hours of your time worth?

Uncompleted Tasks

Unfortunately, it doesn't end there:

Uncompleted tasks trap your attention and cause distraction and confusion along with a feeling of being overwhelmed. It becomes harder and harder to separate the important from the unimportant. Once this happens the goals that we set for ourselves start to disappear from view, and motivation vanishes.

Attention to detail starts to fade. Mistakes happen and one starts to get easily irritated. Issues can be blown out of proportion, and good judgement and the communication with others starts to suffer.

And the worst of it is, that, because of these increasingly difficult working conditions, it becomes harder and harder to consistently and correctly process the upcoming tasks. You're now trapped in a vicious cycle.

Here we have **"Catch 22"** at its best.

√   Don't get caught in this "Catch 22".

√   Plan and organize your day so that you have fewer distractions.

√   Whenever possible complete your tasks so they don't have to be touched again.

Free Roads Ahead for the Bold

The workflow on your desk, in your office and in your organization can readily be compared with road traffic, especially the traffic on an Interstate Highway. Things go in a certain direction, have different speeds and at times there are traffic jams.

If you could make U-turns, stop, park or back-up on an Interstate Highway chaos would be rampant – just like it happens in some offices and on some desks.

On the highway you have vehicles travelling at different speeds:

- Cars
- Trucks and Busses

The rule is that the fast traffic is supposed to be in the left lane and the slower ones in the right lane. Whenever that rule is violated, i.e., a slow moving truck drives in the left lane, everything slows down, people get frustrated and if there's lots of traffic it ends up creating traffic jams. But if the lane rules are followed, then the fast traffic moves fast and the slower traffic slow without bothering each other.

The same rule applies to the office highway, the desk. If the tasks coming onto the desk get mixed into the fray, everything will be moving slowly. The requests for information or critical responses and the long term projects have different speeds and a system recognizing that fact should be put in place for sorting and presenting tasks accordingly.

Tasks that are on hold because a reply from someone/somewhere else is expected (the same day) should be placed in a "Pending" basket (the highway shoulder). This way they are easily located. Just remember, though, that parking is illegal on the shoulder of a highway. The "Pending" basket is never used as a storage place!

Basic road rules for having an efficient work flow include that once you have started on a task it should be finished right away whenever possible. Putting it back or aside for later time is just as much against the rules as is turning around or backing up on an Interstate Highway.

Things that need to be worked on at a later time (for example a project) should be placed either in a special folder map which is designed to remind you to work on a task or project step at a specific time or in an area off the desk designated for projects (a basket or a set of hanging files). A truck driver who stops in the right lane to take a rest is just as much of a barrier (and a danger) to the traffic flow as a Porsche driver that stops in the left lane because he has to read a map.

To lighten the traffic in your office, co-workers and subordinates should be encouraged to think in and to present solutions instead of problems, just as one wants to avoid having people drive against the traffic.

√   Make sure that things are processed based on being "Cars" or "Trucks".

√   Don't mix up slow and fast tasks.

√   Encouraged co-workers to think in and to present solutions instead of problems.

√   Use a system that remembers for you, so you don't have to.

Searching for Something? You Should Find It, Too!

Executives quite often spend too much time trying to find things like documents, files, etc., sometimes up to 45 minutes or more. And at times all the effort spent searching does not even result in finding what one is searching for. That can be very upsetting and costly.

On top of that the government requires that you keep some documents and records for a certain amount of years, especially tax records. Check with your accountant and your lawyer about the exact requirements.

The speed of processing information and the increased efficiency through the use of computers and other modern technologies has increased dramatically, but so has the volume. The challenge of processing, routing and storing all of this information has become greater than ever. Besides paper we now have emails, websites, manuals, instructions etc. to file and store. Now it is especially vital to differentiate between the important and the unimportant:

- What documents and other types of information do you have to store for an extended time because of financial, legal or commercial reasons?

- What information or documents must be store/filed in such a way that they are easily accessible because they are vital for the accomplishments of your goals?

After you have eliminated all of the unimportant stuff, establish a clear, easy and unified system for the storage, filing and recovery of all files and information.

And then make certain that this system is known and used by all. It does not have to be the best system in the world, but is has to be workable. Avoid as much as possible that employees have different ("their own") methods of storage or filing systems. This just leads to extensive efforts in finding things, as it is happening right now…

Review your files and stored information quarterly and get rid of the things that are no longer needed.

Make it the rule, on a daily basis or at least at the end of the week, that everyone in the organization (yourself included), cleans up and straightens out his/her work space, puts things back into the right place and makes certain everything functions correctly and is ready for use. Through this action alone will you experience quite an increase in the efficiency of your organization.

√	Inform yourself of the legal, financial and commercial rules involved in the storage of documents and other information.
√	Decide which documents or information must be easily accessible to reach your goals.
√	Establish a clear, easy and unified system for the storage, filing and recovery of all files and information that is being used by all.
√	Demand that everyone cleans up and straightens out their work area on a regular basis.

Filing or "Storing"

One can file things in different ways and by different sorting systems. Any filing is better than just "storing" papers in a drawer or box, etc. There are binders and there are folders. You use what works best for you.

The key difference is in how you sort things. Things are best sorted by the different Hats (Roles) one has. For example: There could be a Marketing Hat, Sales Hat, Finance Hat, etc.

Within these hats there can be sub-categories: In the finance area this could be different banks, Credit Cards, etc. This also includes filing chronologically and alphabetically. The questions to ask yourself are, *"Which system makes it the easiest to file and find the information?!"* AND *"Where would I look for it?!!"*

When filing sub-categories alphabetically there is a factor that has to be taken into consideration: Sometimes one files by the name of the organization one deals with, however, at other time it could be by the name of the contact one works with. As an example, a proposal from *"James Smith",* the contact person from the *"US Acme Corporation"* could be filed under *"Smith, James".* Later on someone else looking for this proposal could be looking for it under *"US Acme", "Acme"* or *"Smith".*

When something could be filed under more than one name than it might be easiest to make a file for each, but keep the information only in one file while putting a note in the other files directing you to the file where the information is kept, simple but effective.

DO NOT have a file called "Miscellaneous" or "Temporary". Such a file will quickly fill up with all kinds of information, important and un-important ones. It's an open invitation to accumulate a confusion.

It is best to file things right away instead of letting things accumulate. This way you don't have to deal with it twice. An exception could be when you are doing payroll or paying bills, where you can do the filing all at once after you have completed those actions.

√   Do NOT have a file called "Miscellaneous" or "Temporary".

√   Work out the system to be used for filing all information and make certain everyone follows the system.

√   File things right away instead of letting it accumulate.

How to Make Discipline Work for You

At times it takes quite some discipline to complete a task you have started, especially if the task seems complicated or cumbersome.

There are two different sets of circumstances that can provide the motivation or discipline needed to get these tasks completed:

1. outside influences like specific rules, a tight schedule, a demanding boss, a nagging co-worker or a demanding customer,

2. a sufficient amount of self discipline based one the desire to accomplish something.

Experience has shown that people at times are able to surpass the normal and accomplish amazing feats when confronted with an extreme or threatening situation. In such a situation the persons is able to "move mountains".

However, these are very rare occasions and this is not how it normally goes in our daily life. To be successful and accomplished requires **clearly defined goals** and **guidelines (policies).** You cannot expect a high level of discipline without these two factors in place.

The biggest enemy of discipline is what we call, for the lack of a better term, the "inner demon". He doesn't want to follow procedures, rules, or requirements, nor does he want to be controlled in any way. He is a never ending source of excuses, delays and departures. In the day by day attending of the office traffic he provides you with lots of unnecessary stop signs, speed limits, construction signs, etc. and so ruins all efficiency.

Don't give this "inner demon" free reign. Catch him and put him on a leash by:

1. Setting a good example yourself,
2. Clearly define and enforce the rules, requirements and demands for each and make certain that they are understood and followed,
3. Publish the Goals for your business internally and make certain and that they are known, agreed to and contributed to by all and
4. Never permit that tasks are ignored or left incomplete.

√ Clearly define the rules, requirements and demands for each and make certain that they are understood and followed.

√ Make certain that the goals for the organization are known, agreed to and contributed to by all.

√ Set the example for others by keeping your own discipline high.

√ Never permit that tasks are ignored or left incomplete.

Your Team

An organization is never a "One Man Show". There's always some kind of a team involved. No-one is ever working totally by him- or herself. Even when one works alone, at times one needs a customer, a delivery or someone that assists in some way, shape or form.

Whenever people work together to accomplish a common goal or to help each other accomplish a common task, you have a team. The word "Team" comes from the Old High German word "Zoum" which meant "harness". According to this a team was therefore originally a set of animals that were pulling a cart, a plow or even harnessed to a mill.

Thus, people that pursue a different or opposite goal are the enemy, competition, rivals or are not involved at all. Many tasks or objectives can only be accomplished by a team.

Teams can accomplish a task or objective much faster and in less time – more efficiently – than a single person could. A well organized basketball team, that perfectly plays together and follows a good strategy, will always beat a troop of lonely stars that cannot play together, since each one of them is only involved in demonstrating their own prowess. They will always loose against a well-organized team.

As you can see, the key factor for a successful team is the common goal of the organization or the common purpose for a task or an objective. When everyone has a different idea, there is no team. Therefore, you must first make certain that all involved understand what this is all about.

This in itself, though, is not enough. It's not a guarantee for success. Every person involved could follow a different strategy, set arbitrary policies or develop their own individual approach and thereby mess up the whole team approach. A mutually agreed upon strategy, policies and established hats (roles) must exist, just as well as the goals must be understood and agreed upon by all involved.

Finally, a team must be organized in such a way that each teammate's abilities are used accordingly. Based on that, each team member is assigned his/her main hat (role) and understands the responsibilities involved, i.e., which functions (and sub-functions) are his/hers, which decisions are his/her to make and the results that are expected.

When everyone has understood the role they play and the roles everyone else plays and is acting accordingly, then it is only a matter of practice in working together. Add to that efficient communication and one can expect the organization to reach a very high level of co-operation and team work. Such a team is almost impossible to stop.

√ First make certain that everyone knows what the goal for the game is.

√ Have an agreed upon strategy, policies known and followed by all and assigned hats (roles) that are understood and worn.

√ Compile a team where no-one is overburdened or is idle and where everyone clearly knows what his/her responsibilities are.

√ Always work on improving the communication within the team.

"Windows" - But You Can't See…

IT – Information Technology – is probably the greatest technical breakthrough of the last 50 years. Once the world was thought to be flat and, after overcoming some serious resistance, it was found to be round. Now Information Technology is in the process of "flattening" our world view again by standardizing the representation of two-dimensional realities on a flat screen. This is not necessarily a bad thing.

Because of today's high speed connections, the World Wide Web and the Internet, there is an avalanche of information at our fingertips. Useful and useless, correct and manipulated information, ideas, ideologies, propaganda and real information, it's all available today at the click of a mouse. If there is no filter in place to separate the *useful* from the *useless* and the *important* from the *unimportant* then the flood of information becomes overwhelming. Instead of making work easier and increasing efficiency, IT becomes a problem in itself.

Add to that the ongoing software and system updates, new tools and inventions, applications and all kinds of combinations available. Some of which were, not too long ago, relegated to the realm of Science Fiction, what do you have: The PC is a Telephone, the Telephone is a Camera, the Camera is a TV – or was it the Telephone?... Regardless whether it is listening to music, navigating, calling someone, buying, transferring funds, watching TV or a movie or reading a book, all of it is happening in real-time with the help of just one or two pieces of sparkling electronic tools. The future is happening right now.

Don't get lost in it all. The idea is not *"do everything you can do".* Sitting at a music hall and listening to a real life concert cannot be substituted by using you phone – or was it the camera? Playing a game of basketball in real life is still more exhilarating than doing it on the computer. You have to decide, based on your own goals, what is important or unimportant to you. And some times, as unbelievable as it may sound, the electronic way is not necessarily the most efficient one.

To stay on top of your IT systems an agreed upon system for filing and storage is vital. Here also do not allow that tasks are ignored or not completed. Information is only valuable when it can be easily retrieved.

Learn and know what the different abbreviation and designations you're using mean. There are thousands of them in IT and only a few are of importance to you. You should know what the signs and abbreviations on your keyboard mean and what the sales person, trying to sell you a new "Laptop", is talking about. While this may seem somewhat off the subject it is a vital part of being on top of the IT issue.

√ Decide, based on your goals, what is important or unimportant in the IT arena.

√ Learn and know what the different abbreviation and designations you're using mean.

√ Even in IT, do not allow that things are not or only partly done or are lost to you because they are filed on a hard drive without using any kind of a uniform and agreed upon system.

Bravo Oscar Sierra Sierra - "Boss" - do you read me?

Communication is by far the most important tool you use when leading your co-workers, negotiating with your suppliers or selling to your customers.

Today, too much importance is given to the communication media and not enough to the actual quality of communication. Did our teamwork or our interpersonal relationships greatly improve because we now have cell phones and can call, text or e-mail each other at any time?
Does it significantly improve the orders we get or the sales we make? I don't think so.

There is a great variety of *Communication* since it mirrors life itself. It is not as important *what* we tell someone else than it is *that* we talk with each other. It is not as important *how* we communicate than it is that we accomplish the *goal* of the communication itself.

When you talk with someone you want to *understand* and you want to be *understood*. That's important! Simply put, when you want someone to do something you communicate that to the person. Your *intention* is that the co-worker *understands* what you want done and does it. However, if the co-worker only partly or not at all understands or if his/her understanding of it is wrong, then what you want done is not going to happen. That can be quite upsetting and is almost always a big waste of time and money.

The main reasons for missed or failed communication are easy to see:

- The more emotional the message is (angry, etc.), the more resistance it will meet. Sometimes it's not *what* you say, but *how* you say it.
- Missing clarity in your instructions leads to guesswork by the recipient, who now has to "guess" what it is you really want.
- Lack of attention by the co-worker will only allow part of the communication to arrive.
- Prejudice, bias and earlier upsets cut down the willingness to listen and thereby prevent a smooth exchange of ideas and information.
- Not getting an acknowledgement that what you said was understood can make one unsure if the message got across and was understood as intended.

In most cases it is better to **"put it in writing"** when you want to make certain that your instructions arrive and are understood. This way you are not interrupting others in the middle of doing something and they do not have to carry it around "in their head" until it is done. By the way, the same applies to yourself just as well, since you are human, too.

√	Be mindful of how you communicate and continue to improve the clarity and intention of your communication.
√	Demand full attention when you talk to someone and give full attention when being talked to.
√	Bury the past and communicate to others without bias or holding a grudge.
√	Acknowledge that you have received and understood a communication and request the same from others.

Conference or Confusion

Conferences or "Meetings", as they are called today, are a very effective tool when used correctly. They help in the dissemination of information, coordinating activities and in raising the team spirit. When used wrongly, though, they can lead to endless discussions, upsets and lots of wasted time. Presenting problems without solutions or the means to address the problem, opinions, rumors, reproaches or accusations should never be part of a meeting agenda.

Successful meetings are planned in advance and include:

a. A set time and place
b. A stated purpose
c. A stated desired outcome
d. The correct attendees
e. An Agenda based on a, b & c above
f. Prepared attendees
g. A Moderator
h. Results

A set time and place: Meetings should be held on a regular basis. Make certain the meeting starts on time and ends on time and do not permit any interruptions. Weekly meeting should always be held on the same day and time.

The stated purpose should explain why the meeting is being called, i.e. weekly production coordination, product development, to develop a new marketing approach, etc.

The desired outcome: This is the goal for the meeting. It is stated as an accomplished fact and the more specific it is the better the meeting can be focused on it.

The correct attendees: Someone from the production division would not need to be in a meeting that focuses on marketing. Make certain that the people invited to it are the people that actually should be there.

The Agenda: It should be in writing and list the points that are going to be addressed in the meeting. These points must focus on the purpose and the desired outcome. One sticks to the agenda throughout the meeting and does not allow new introductions since that's an invitation for a "free for all".

Prepared attendees: The moderator should send a copy of the meeting form (which lists out all the points mentioned above) and a filled out agenda to all attendees a day or two before the meeting, so everyone can be properly prepared. Sometimes suggestion for additional points for the agenda should be asked for. However, it is up to the moderator to include any of these suggestions.

The Moderator is responsible for filling out the meeting form, calling the meeting, making sure all attendees come prepared and are on time with cell phones turned off, presides over the meeting, doesn't allow interruptions, makes certain the agenda is addressed and stuck to and so achieves the desired outcome.

The Results: All decisions, planned actions, projects and solutions coming out of the meeting are put in writing by the moderator or an assigned secretary and are distributed afterwards to all attendees. The smart moderator has Project Forms and Task Assignment Forms on hand during the meeting, so that any project(s) decided on during the meeting can be worked out right away with everyone present and any Task Assignments can be delegated in writing at that time. This way the moderator (who is usually the executive) does not have to have a "meeting after the meeting".

√   Use meetings constructively, to inform, to plan, to coordinate and to raise the team spirit.

√   Stick to the times stated and stick to the agenda.

√   Make sure the meeting is lead in a positive manner and the results are attained.

√   Keep a written record of the meeting and make certain all attendees get a copy.

As Time Goes By

When looking back on years gone by, some executives/business owners can tell if they are progressing according to the plan they made for their business growth or if they're not, while others have no clue simply because they never clearly defined where they wanted to go.

While planning the future growth of your business and then committing yourself to it can be somewhat scary, consider what a great German philosopher once said:

"Until one is committed, there is hesitancy, the chance to draw back, always ineffectiveness. Concerning all acts of initiative and creation, there is one elementary truth, the ignorance of which kills countless ideas and splendid plans:
That the moment one definitely commits oneself, then Providence moves, too. All sorts of things occur to help one that would never otherwise have occurred..."
Johann Wolfgang von Goethe

So, it all starts with a plan. Here is a good way to work out a FIVE YEAR ACTION PLAN for your business:

Decide where you want your business to be five years from now. What is the gross income and what is the profit for that year? When you state the income, you can work out the profit or vice versa. What does this mean in terms of sales, production, service, delivery, marketing, staff and possibly the size of the facility? How is that best worked out?

The first step is to take a close look at your current operation.

Here is an example:
Your business is currently doing $500,000/year. In five years you want your business to reach $2.5 million/year. Let's say your planned growth rate is:
- Year 1 = $750,000
- Year 2 = $1,000,000
- Year 3 = $1,500,000
- Year 4 = $2,000,000
- Year 5 = $2,500,000

Now take a look at your current operation:
a) What is your marketing cost and how effective is it? How much would you need for marketing to accomplish next year's targets, or are there other marketing efforts that should be included or changed to?
b) What are your current sales figures? What is your closing ratio? What would need to be there to make next year's numbers? Will you need to hire another sales person or more?
c) What is your current production / delivery capacity? Are you staffed up for next year's production? Is the staff training adequate?
d) Then work this out for year 2, 3, 4 & 5. Work this out year by year, taking into consideration the sales/production capabilities and abilities of the staff and the time needed for hiring and training.

Using your knowledge and experience you'll have a pretty good idea what it takes. Based on that you can work out the actions needed for all the different areas for year #1.

Then do the same with each of the following years.

Now focus back on Year #1.
- Break the year down into 12 month and determine the actions that need to be done to accomplish the year's target on a monthly basis. If your business is seasonal make certain that you include that factor.
- Having it broken down into monthly action targets you can now break it down into weekly action targets. Work out who's supposed to do what and give these weekly production targets to the appropriate person, including you.
- I'm sure that by this time you will have realized that this is actually doable and that "YOU CAN DO IT!"

When you get close to the end of year #1 it is time to work out the monthly/weekly actions needed to accomplish the growth for year #2.

Note: If things are going better than you had planned, raise your goals!

Now commit yourself to the plan and DO IT!

√ Decide where you want to be in 5 years from now.

√ Look closely at your current operation and identify the different areas and actions involved in accomplishing last year's production.

√ Using that information, plus your knowledge and experience, work out what you'll need to accomplish Year #1's goals. Now do the same for year #2 through year #5.

√ Next get back to year #1 and break it down into monthly/weekly production and action targets.

√ When you get close to the end of year #1 do the same for year #2

√ When you do better than planned, raise your goals!

√ Commit yourself to your goals and DO IT!

Summary

√   Do It Now

√   Do It Only Once

√   Don't bypass your employee and meddle with his/her work.

√   Try not to delegate your own "bothersome" work to others.

√   Assign responsibilities and avoid "camouflaged holes" in the Organization.

√   Whenever possible, *put things in writing!* And get a compliance report back when applicable.

√   Tasks that are left undone or incomplete will allow backlogs to build up. Do not permit this to happen. Whenever possible "Do It Now and Do It Only Once"!

√   Don't get caught in the vicious cycle of mounting backlogs taken over your work life.

√   Plan and organize your day so that you have fewer distractions.

√   Whenever possible complete your tasks so they don't have to be touched again.

√   Make sure that things are processed based on being "Cars" or "Trucks".

√   Don't mix up slow and fast tasks.

√   Encouraged co-workers to think in and to present solutions instead of problems.

√   Use a system that remembers for you, so you don't have to.

√   Inform yourself of the legal, financial and commercial rules involved in the storage of documents and other information.

√   Decide which documents or information must be easily accessible to reach your goals.

√   Establish a clear, easy and unified system for the storage, filing and recovery of all files and information that is being used by all.

√   Demand that everyone cleans up and straightens out their work area on a regular basis.

√   Do NOT have a file called "Miscellaneous" or "Temporary".

√   Work out the system to be used for filing all information and make certain everyone follows the system.

√   File things right away instead of letting it accumulate.

√   Clearly define the rules, requirements and demands for each and make certain that they are understood and followed.

√   Make certain that the goals for the organization are known, agreed to and contributed to by all.

√   Set the example for others by keeping your own discipline high.

√   Never permit that tasks are not done or left incomplete.

√ Make certain that everyone knows what the goal for the game is from the start.

√ Have an agreed upon strategy, policies known and followed by all and assigned hats (roles) that are understood and worn.

√ Compile a team where no-one is overburdened or is idle and where everyone clearly knows what his/her responsibilities are.

√ Always work on improving the communication within the team.

√ Decide, based on your goals, what is important or unimportant in the IT arena.

√ Learn and know what the different abbreviation and designations you're using mean.

√ Even in IT, do not allow that things are not or only partly done or are lost to you because they are filed on a hard drive without using any kind of a uniform and agreed upon system.

√ Be mindful of how you communicate and continue to improve the clarity and intention of your communication.

√ Demand full attention when you talk to someone and give full attention when being talked to.

√ Bury the past and communicate to others without bias or holding a grudge.

√ Acknowledge that you have received and understood a communication and request the same from others.

√ Use meetings constructively, to inform, to plan, to coordinate and to raise the team spirit.

√ Stick to the times stated and stick to the agenda.

√ Make sure the meeting is lead in a positive manner and the results are attained.

√ Keep a written record of the meeting and make certain all attendees get a copy.

√ Decide where you want to be in 5 years from now.

√ Look closely at your current operation and identify the different areas and actions involved in accomplishing last year's production or to where you are now.

√ Using that information, plus your knowledge and experience, work out what you'll need to accomplish Year #1's goals. Now do the same for year #2 through year #5.

√ Next get back to year #1 and break it down into monthly/weekly production and action targets.

√ When you get close to the end of year #1 do the same for year #2.

√ When you do better than planned, raise your goals!

√ COMMITT YOURSELF TO YOUR GOALS AND DO IT!