Never Check E-Mail in the Morning: And Other Unexpected Strategies for Making Your Work Life Work

Our next series is based on a book by Julie Morgenstern: "Never Check E-Mail in the Morning: And Other Unexpected Strategies for Making Your Work Life Work", Fireside, 2004 (the book was previously published under the title "Making Work Work"). It provides some very practical advice for managing your time and that elusive work-life balance (in some ways it is similar to the "Getting Things Done" series we did back in 2003/2004). As with any of these kinds of books, you will probably find some techniques that work well for you and some that don't suit you. The book also has some very good illustrations, taken from various clients who Morgenstern has worked with over the years.

Introduction

I'll let her introduce the book: "I am in the business of untangling messes. When a client calls me in to help sort out his work life, his head is usually swimming; he feels wound in a big knot... he feels a sense of responsibility but is unsure where he leaves off and where his company or coworkers come in. When work isn't working, the perplexing and commanding puzzle we are faced with is, 'Is it me or is it them?' Who, or what is causing the meltdown? ... Is there something we can do to correct the situation, or is it truly beyond our control?" The book sets out to provide some answers to these questions and some ways of reversing the sense of drowning. While your situation may not be quite as dramatic as that portrayed here, many of her techniques are helpful for managing time better and getting a more balanced life. In particular, she often focuses on the question of whether it is you or "them" that is the problem and how to deal with the very different circumstances that arise from the answer to this question.

She makes the point that modern workplaces are very stressful, highly charged environments with increasing demands for productivity and effort that can sometimes be overwhelming, or at least feel that way. She tells the story of Rita, a successful marketing executive at an advertising agency who rose to the position of vice president. She loved her job and was very successful at it. After a year in the new position, the company had won two awards, attracted some large new clients and was attracting some very talented new employees. "Her coworkers and boss appreciated her efforts, and Rita felt confident and in control... Work was working."

However, after some time Rita began to lose control - her task list started to grow uncontrollably, and she started to work longer and longer hours, sacrificing family time. Her desk got swamped in paper, and her productivity plummeted. She was desperate by the time she asked Morgenstern for help.

When Work IS Working

We all know what it is like when things are going smoothly at work: "liking what you're doing and being good at it - feeling appreciated, in control, successful, and in balance". The end of the day brings a warm glow of accomplishment (and comes long before 10:00pm!). Morgenstern's book sets out to give you the "skills and techniques" to help you get to this state.

The book is organised into nine "competencies", dealing with different aspects of work. These competencies apply across different jobs and different industries. They are:

1) Embrace your work/life balance
2) Develop an entrepreneurial mindset
3) Choose the most important tasks
4) Create the time to get things done
5) Control the nibblers
6) Organise at the speed of change
7) Master delegation
8) Work well with others
9) Leverage your value

She notes that mastering the competencies is an ongoing process and that it will be helpful to keep revisiting the material. In addition, small internal changes can produce large external results, so give things a try and see
how it goes. The order given above is the order that she usually uses with clients: starting with the internal, personal issues then moving onto the external, environmental and relational issues.

In closing, Morgenstern returns to the tale of Rita. Their consulting relationship started off gradually, trying to tease out what the underlying problems were. As is often the case, it was a mixture of her and "them". The demands of her job had changed over the years, and her previously successful patterns did not work well any longer. "By applying the nine competencies... she broke patterns that had been with her for years - and entered the new world of work with an ungraded skill set that her feel productive. Work became meaningful again".

Morgenstern promises that using her techniques "will help you feel less trapped and more in charge - you'll be able to make a bad situation better, restore a formerly good situation to balance, or confidently search for a job that's a better fit for who you are... you will boost your clarity, confidence, and performance, and find a way to make work work".

Some things to think about:
1) How happy, in-control and balanced do you feel?
2) What is causing any sense of unhappiness or imbalance?

Self-Assessment

The second chapter of Julie Morgenstern's book "Never Check E-Mail in the Morning" gives some guidelines for a self-assessment, and, in particular, tries to answer the question "is it you, or is it them?" that we introduced in the last session.

Morgenstern opens the chapter by telling of a flight she once had where she sat next to a very distinguished older man. He "emanated a striking sense of calm contentment... was gracious and kind". She started up a conversation and discovered that he had begun 20 year earlier by starting a small company with two employees to manufacture food packaging. When Morgenstern met him, he employed 400 people and manufactured 70% of the frozen-food packaging in the US. As she grilled him on how he had grown the company and how he managed his employees, he told that he divided his employees into three conceptual groups, or tiers: (1) the top tier of high-achievers; (2) the middle tier of reliable, steady workers; and (3) the bottom tier of under-performers.

Morgenstern notes that something like this kind of categorisation is very common in business (I've heard leaders talk about their A list, B list and C list, for example). In a cut-throat business environment, survival often depends on being judged as part of the top tier, which raises the question of how one can achieve and maintain this status in a rapidly-changing working environment. She comments that top-tier workers have a combination of talent and efficiency, and that both are vital. In her experience, top tier workers "not only understand but truly believe in the company mission. They are able to connect their daily tasks to that vision to consistently deliver measurable results. They're in positions that bring out their best talents and skills [c.f. Marcus Buckingham's focus on personal 'strengths']", are confident about their own abilities, and are ready, willing and able to go the extra mile. But they also keep their lives in balance... so that they can replenish their energy and recharge their perspective for their work". Morgenstern notes that this is a win-win situation, as getting these basics right both enhances your value to the organisation and also provides personal meaning and satisfaction.

She then provides a self-assessment quiz that aims to give you an idea of which tier you might fall into. The assessment can also be revisited as you implement the suggestions and techniques presented in the rest of the book to allow you to gauge your progress. You should rate yourself from 1 (never true) to 5 (always true) on the following questions. Don't think about the answers too long - just note down your initial response (the assessment should not take more than about ten minutes); and be honest - no one else will see your score. The rest of the book contains helpful methods for addressing any weaknesses you might uncover or for further strengthening your strong points. If you concerned that your self-perception may be inaccurate and are brave enough ask a colleague or your boss to rate you on the same set of questions and compare your rankings.

1) When overloaded are you easily able to prioritize and focus in on the most critical tasks?
2) Do you turn work around quickly, rather than letting it get baked up on your desk?
3) Do you have a good way of tracking your to-do list?
4) Do you have a general structure to your day or week that enables you to feel in control of when you do things?

5) Are you physically organized, keeping papers, computer documents, contact information, and work materials in order and at your fingertips?

6) Do you have productive, efficient working relationships with your coworkers, assistant, direct reports, boss?

7) Are you generally pleased with your work/life balance?

8) Can you clearly identify the core responsibilities of your job?

9) Do you feel secure in your ability to performing each area of your key responsibilities?

10) Can you easily let go of low-priority items, without guilt?

11) Do you understand and believe in the mission of your organisation?

12) Do you know what your most valuable contribution is? What makes you unique?

13) Is your most valuable contribution what your employer wants?

14) Do you keep yourself current in the expertise required by your job?

Scoring: Add up your points (1-5) for each question to get a total out of 70.

14-30: You're in trouble! You are probably experiencing high levels of frustration, and low motivation. Competencies 1 and 4 will provide help if you are in this situation.

31-50: You're hanging in there, but probably finding it difficult. You may be experiencing stress, particularly around your work/life balance. The competencies presented in the rest of the book will probably be helpful in their order of presentation.

51-70: You're organised, confident and doing well. The competencies in the rest of the book will help you to improve and become even more efficient. She suggests starting with competency 9 and then dipping in and out of the others as you feel the need.

Since most people are likely to fall into the middle tier, I will follow the order of presentation in the book - if you need to jump to 9 or 4, be patient! And as a reminder, the nine competencies, which we listed in the last session, are:

1) Embrace your work/life balance
2) Develop an entrepreneurial mindset
3) Choose the most important tasks
4) Create the time to get things done
5) Control the nibblers
6) Organise at the speed of change
7) Master delegation
8) Work well with others
9) Leverage your value

As already mentioned, the good news here is that improving in the areas that will boost your score will not only increase your value to your organisation, but will also help you feel better about yourself and your work. You don't have to resign from the human race to spend all your time in the office!

Turning to the question of whether it is you or them, there is also good news: "you are in control". If you're the problem, you can develop better attitudes and habits. If your work environment is the problem, you can learn to work around the problems and manage their consequences better.

The assessment measures two aspects of your working life: (1) your levels of organisation/productivity, and (2) "your relationship to your job" - how engaged and balanced you feel. Morgenstern turns to each of these areas in turn.

Improving Your Productivity

If you scored poorly on 1, 2, 3, 4, 5, 10, or 14, it is likely that your levels of productivity and organisation are the problem. Do you feel overwhelmed by your workload, or constantly battle with interruptions and
distractions? Given that many people work in environments where it is impossible to do everything, learning to prioritise and focus on high-value activities is a very important skill. Morgenstern then turns to the "you or them" question.

It could be you if:
- you don't plan well
- you lack confidence on some tasks
- you are unable to prioritize
- you are a perfectionist
- you feel guilty saying no
- you gravitate towards quick, easy tasks
- you're poor at estimating how long things take
- you're physically disorganized
- you start many things, finish none

It could be them if:
- your boss, customers, or coworkers are always in crisis mode
- your boss is a perfectionist
- the corporate culture is driven by fear
- the company is understaffed, requiring you to pick up slack
- coworkers are not pulling their own weight
- meetings are poorly run
- you are lacking materials or direction from leadership
- you have an unrealistic workload
- you work in an interruption-rich environment

Competencies 3, 4, 5 and 6 are likely to very helpful if you find yourself in either of these situations.

Improving Your Relationship to Your Job

A low score on questions 6, 7, 8, 9, 11, 12, or 13 indicates a problem in this area. Understanding your strengths and your unique contribution to your organisation may be helpful. Does this align with your employer's expectations? Can you define your role in terms of 3-5 core responsibilities? "For example, a salesperson pursues leads, prepares contracts, monitors clients, submits reports; and administrative assistant coordinates travel, keeps daily schedules, drafts letters, screens phone calls". (Don't confuse your "responsibilities" with your "tasks" - e.g. answering email or attending meetings). The "you or them" question arises here again.

It could be you if:
- you lack the ability to see the big picture
- you're caught in the daily details
- you don't like your role
- you feel like a victim
- you have a fear of tooting your own horn
- you lack confidence
- you are not the best judge of your own abilities
- you took the wrong job
- you have poor people skills
- you feel guilty breaking away from work

It could be them if:
- your job description keeps changing
- the company is in transition
- your industry is rapidly changing
- your boss forgets what he's asked you to do
- your boss is inexpressive and short on feedback
- there is a lack of honesty in performance reviews
- the boss or culture is hypercritical
- the company has different values from yours
- there's a change in management
- your company make unrealistic demands
- the culture is cutthroat
- there's a pressure for face time
- the organization is disorganized

If this sounds like your circumstances, then competencies 1, 2, 7, 8 and 9 are likely to be helpful.

In closing, Morgenstern notes that these competencies can be learned - you can improve your score and your happiness with your work life, in order to move up the tiers. "It's time to upgrade your skill set so you can survive, thrive, and enjoy yourself in this challenging but exciting new world of work".

Some things to think about:
1) What did you score on the self-assessment? Does this agree with how you felt about your situation at the outset?
2) What are your core responsibilities? How well are these aligned with your strengths?

**Embrace Your Work/Life Balance**

The third chapter of "Never Check E-Mail in the Morning" by Julie Morgenstern starts to discuss the "competencies" she recommends. The first addresses the issue of finding a good work/life balance, a vitally important skill when faced with the demands of the modern workplace.

She opens the chapter with story of Rita, "an overstressed advertising executive". Rita was working 13 and a half hour days most of the time, and using her weekends to work on projects at home. She never got to the end of her to-do lists, and felt guilty about taking time off for herself. She had gained a lot of weight, was suffering from lower back pain and her doctor was concerned about her health. She would try to sustain her pace by snacking on sweets and diet cooldrinks in the afternoons (dinner often only happened at about 11:00pm). She assured her doctor she would start to take better care of herself when she got on top of her work.

Morgenstern makes the point that, for many people in this kind of situation, it seems highly counter-intuitive to pull away from work. After all the problem is that one is not getting all of one's work done - surely taking time off isn't going to help? However, focusing on work/life is the first of the competencies for a very good reason. In the busyness and pressure of work, "our personal lives are usually the first thing we sacrifice. That puts us in a precarious situation - when our balance is off, our performance suffers, along with our happiness and motivation. If you are feeling overworked, exhausted, and depleted, the _first_ step is to let go at work and take care of yourself". Just doing something simple like getting adequate sleep can make a huge difference in your productivity levels when you are at work. In order to deal with the pressures of the workplace you _must_ ensure you are sufficiently recharged through personal time that is "rewarding, refreshing, and energizing". While finding a good work/life balance might appear impossible, Morgenstern
assures us that it's not. In her experience as a consultant the "top-tier performers" are very focused on maintaining well-balanced lives. While they might work long hours, they ensure that they get the maximum benefit from their time off. It might not be easy, but the top performers know that they have to do this to stay at the top of their performance. Morgenstern lists a number of advantages to be gained from finding a good work/life balance:

- Energy: your productivity will improve if you are happy and healthy.
- Accuracy: you will make fewer mistakes if you are well-rested and less stressed.
- Innovation: you will often come up with your best ideas out of the work environment (I find a ride out of town on my bike, or even just a shower can be very good thinking time).
- Patience: keeping a healthy perspective on problems is much easier when you're enjoying a balanced life.
- Motivation: finding a good balance can help provide a sense of purpose and meaning, rather than work simply being an awful drudgery.

Morgenstern uses a metaphor of feeling like you're just hanging onto the edge of a cliff by the tips of your fingers. She gives a short True/False test to help you judge just how near you are to the edge.

1) I'm constantly sleep-deprived. Artificial stimulants like sugar and coffee are the primary way I keep myself going.
2) Things take far longer to do than they used to - I'm operating in slow motion. It's hard to make decisions, think clearly, prioritize.
3) My fuse is very short - I've become cranky and quickly annoyed over even small things.
4) I've gotten unfit and/or gained weight because of lack of exercise and/or poor eating habits.
5) I haven't been to the doctor in ages - too busy at work.
6) I haven't had a holiday in ages. I fantasize about falling ill so that I can take some sick leave!
7) Many of my family and friends are often hurt or disappointed because I'm never around.
8) I'm putting too much stock in work - it's my only source of recognition and self-worth.
9) I used to love _________ (fill in the blank with your favourite pastime, maybe gardening, reading, listening to music) but I don't have the energy to enjoy it any more.
10) I'm always too tired to do anything other than collapse at night and weekends - I am permanently exhausted.
11) During the workday I have to steal time for myself (personal emails, running errands, etc.) because I have no time for myself otherwise due to the 12- to 14-hour days I'm working.

Scoring: count the number of "True" responses, and rate yourself roughly as follows:
1-4: Good balance - keep it up.
5-8: Losing your grip.
9-11: Danger zone.

Strategy #1: Let Go and Grab Hold

This refers again to the cliff-edge metaphor. You need to take a "leap of faith" that your workplace will not implode if you take a few hours for yourself. Let go of the cliff-edge and lunge for that ledge! "Trust that work will survive without you for an hour, an evening or a weekend. You must embrace the fact that sometimes your best hope for getting to the bottom of your to-do list is to let go and take care of yourself personally". Morgenstern defines "balance" as efficient energy management - ensuring that your private time is spent on activities that leave you feeling relaxed and energised. When you're feeling like you're getting close to that cliff edge, you choose to take a break. Getting home from work late and exhausted so that all you can face is blobbing in front of the TV is probably not going to set you up for a great performance at work the next day. Exactly what you need to do, and how much time you need to allow will vary from person to person. Some people might settle for a day a month, others might want to take a long holiday once a year, some might want to spend a few hours in the garden or reading a book, others might want a weekend at a spa. Depending on your personality, time alone might be refreshing, for others time spent relaxing with friends leaves them energised. Some people think that it will take something drastic like finding a new job, or
escaping the rat-race and joining a commune, or moving to a new town to get a better work/life balance, but
the truth is that you will probably just find that you translate your workaholic drive into the new setting.
Morgenstern tells of a client who quit a very pressured job as a lawyer in a big New York law firm to move to
a small, rural town as a real-estate agent, but ended up working just as hard as before!
Morgenstern shares a personal story about being delayed in an airport after a hectic three-day business trip.
She was exhausted, but had a pile of writing assignments with impending deadlines that needed some major
creative focus. She toyed with pushing herself to do the work, but realised she would be very unproductive
and not that creative in her state. As for a break, she considered just sitting, but decided that wasn't actually all
that relaxing; sleeping wasn't that practical in an uncomfortable airport seat; reading the novel she had with
her would require too much concentration. Eventually she decided to indulge in a rare treat: some fried
chicken! As she ate her meal she was entertained by the sight of two small boys playing together on the floor
nearby. She got home so late that Saturday night that she ended up sleeping through all of Sunday, but on the
Monday she was feeling so refreshed that she had three of her writing assignments finished by lunch time.
She notes that "small changes can yield big results, and even the tiniest shift can give you a whole new
perspective".
Her advice: "Start nice and easy, with one activity at a time. Think of three things that refresh you, that you
wish you had more time to do. Now, let go and regrab, by planning to do one of them today"
Some things to think about:
1) How good is your current work/life balance? What can you do to improve it if necessary?
2) What activities refresh and reinvigorate you? How could you find some time for these? Take
Morgenstern's advice and do one of them, today!

Embrace Your Work/Life Balance: Strategy #2: Balance Your Balance with PEP

This week we continue examine some of the strategies that Julie Morgenstern recommends for finding a good
work/life balance in her book "Never Check E-Mail in the Morning".
Morgenstern opens this section by noting that people often have a dualistic perspective on the work/life
balance issue: there is "work" and there is "home" (or "other"). She suggests rather taking a three-fold view of
the "life" part of the equation and uses the acronym PEP for the three components:
- Physical health
- Escape
- People
She then discusses each of these in turn.

Physical Health
Some people try to compensate for poor sleep and eating habits by using (abusing?) "caffeine, sugar, power
bars", etc. However, these are poor substitutes for a genuinely healthy lifestyle. "Sleep, exercise, a proper
diet, and regular checkups maintain your physical body. This is a basic, essential priority, which provides a
well of energy from which you draw the strength to accomplish everything else you need to do". She suggests
some practical aids in this regard:
1) Monitor your sleep and try to increase it by half an hour each night until it reaches a satisfactory level.
Research suggests that getting by with minimal sleep during the week then trying to "catch up" on the
weekend is not as healthy as having a regular good night's sleep.
2) Be careful in your choice of bedtime reading. Fiction (or poetry) helps relax you, whereas non-fiction tends
to stimulate the mind.
3) Find a type of exercise that you enjoy. There are no end of exercise options available to us today, so there
is no excuse for not exercising. Don't go overboard: start out gradually; and it's fine to exercise three times a
week.
4) Combine your exercise time with "work" by listening to audio books or work-related podcasts while you
work out.
5) Walk everywhere you can (a pedometer will help you assess how much exercise you get this way, and can
help with the motivation to keep walking). George Euvrard's advice on this at the bosberaad a few years ago springs to mind.

6) Take a multivitamin daily (this was one of Jack Groppel's pieces of advice too), and try to substitute healthier options for snacks and break refreshments (smoothies, or fruit juice rather than coffee for example).

7) Get to know your doctor(s). Try to schedule appointments for early in the day, as they are less likely to have fallen behind in the schedule and so there is a reduced chance of disruption to your own schedule for the day.

Escape
Each of us has certain activities that provide "relaxation, refreshment, or just sheer delight". For you it might be gardening or reading or a long soak in the bathtub with candles and music. While taking a time-out for an activity you enjoy might seem to be reducing the time available for meeting your responsibilities and deadlines, in fact it often so reinvigorates you that the remaining time is far more productive than it would otherwise have been. "You will suddenly feel like you have more time on your hands than ever, because you will be energized as you look forward to your time off, and renewed as you think back on how pleasant that time was". Scheduling a relaxing activity for the start of the evening, or the start of a weekend can also help set the tone for your time off. Again, Morgenstern provides some practical tips:

1) Think back to activities that you used to enjoy. Some people look for escape in some new activity, but often old favourites are hard to beat.

2) Pamper yourself. Book in for a massage or a beauty treatment or even just a haircut where you can relax while some one else takes care of you.

3) Stop and smell the roses. Slow down and focus on your surroundings, enjoying the "sights, sounds, and smells, and the activities of people".

4) Buy season tickets for musical or sports events. Schedule the whole seasons programme into your calendar. If a real emergency arises and you really cannot make a show/game then you can give the tickets away and build a relationship through your generosity.

5) Read a novel, if you enjoy reading - it can provide a great escape.

6) Try to listen to music more often, and switch the TV on less. Find or rediscover mood music to set the scene for various activities (cooking, reading, etc.).

7) Do nothing! Make sure you're actively choosing to relax and do nothing, and not just "blobbing" out of unimaginative exhaustion, but a time of just sitting in the garden or going for an aimless stroll can be very therapeutic.

8) Take more regular short breaks (e.g. a four-day weekend each quarter) rather than trying to take one long, stressful holiday each year. Short breaks can provide regular renewal without disrupting your work schedule unduly.

People
When we get busy it is often our relationships that suffer most as we start to take people for granted and rely on past ties, shared experiences, etc. Good relationships require time and attention or they will start to deteriorate. While spending time with someone obviously demonstrates your care for them it also benefits you. Of course, some relationships are more rewarding than others, and you need to try to spend time with people who lift you up rather than those who may leave you feeling more negative and down. Morgenstern's practical tips for relationships are:

1) Say "Hello" when getting home before "Who made this mess?"! In other words, try to start your evening interaction with your family on a positive note.

2) Try to keep several friendships going - don't always socialise with exactly the same group of people. You will find that your relationships with different people benefit you in different ways. Make a point of keeping a wide range of friendships going through regular contact, even if it is just a phone call, a card or an email.

3) Take advantage of common interests. Take a friend or family member to a show or a sports event that you will both enjoy, or sign up for a class (e.g. dancing, pottery, cooking) together.

4) Try to make good use of travelling or commuting time by using it for meaningful conversation and
connection.

5) Try to keep up with birthday, anniversary or seasonal greeting cards. Handwritten messages are very meaningful on these kinds of occasions.

6) Establish routines for regular get-togethers with your friends. Make a point of meeting once a week for a meal, a drink, or a movie night at home with the family.

7) Entertaining can often seem daunting so arrange a bring-and-share meal where everyone contributes something to the meal. You could even combine this with the previous suggestion and have a regular monthly meal, rotating among the homes of the people in the group.

What's Getting Short Shrift?

Morgenstern suggests monitoring your time for a fortnight: how much time do you spend on "sleep, time with friends or family, errands, and so on". You could do this relatively easily by drawing up some "time sheets" with hourly or half-hourly increments and using a colour-coding scheme or some simple notations to record your time usage as you go through the day. Once you have a good idea about how you are spending your off-work time, try to assess what you might try to do more of in order to get a better balance. Which of the PEP factors is being most neglected? What activity could you do that would really leave you feeling reinvigorated? With these sorts of factors in mind try to plan some activities that will help bring a sense of better balance.

Combining factors is a great idea (for example, exercising with a friend will address both Physical health and People; or schedule a spa session with a friend; or exercise with an audiobook or some favourite music). Don't try to do much at once: start out with one or two activities and monitor how these leave you feeling and what impact they have on your productivity. "Everybody needs a variety of activities, and we all benefit from a different mix at different times. Keeping your life in balance is a fluid, ongoing process".

Some things to think about:

1) Which of the PEP factors (Physical health, Escape, People) is most neglected in your life? What one thing could you do in the next week to start to rebalance this?

2) What activity really reinvigorates you? How can you schedule this into the week ahead?

3) This week we come to the third strategy for finding a better work/life balance from Julie Morgenstern's book "Never Check E-Mail in the Morning". This one deals with what is often a huge problem: overcoming one's resistance to changing deeply ingrained habits.

Embrace Your Work/Life Balance: Strategy #3: Break Through Your Resistance

Most people who struggle with finding a good work/life balance know that there's a problem, and usually know what they need to do (or at least have some ideas about how to improve matters). So why can taking these steps be so difficult? Morgenstern examines a number of possible reasons for this in this section.

Work As Escape

For some people work provides a safe, comfortable environment where results are relatively easily measured. "The payoffs of a personal life - a feeling of fulfillment, energy, and love - are more ambiguous, and much harder to measure, define, and access". For some, work provides an escape from difficult relationships, or from loneliness. Morgenstern suggests that you reflect on whether your long working hours are "the result of passion or avoidance".

Morgenstern tells the story of Sara, one of her clients. Sara was single, in her mid-30s and had a very successful career. However, she had a terrible reputation for letting family and friends down at the last minute for social engagements, due to the pressures of her work. Two examples: she was going to her sister's home for lunch one Sunday when she stopped at her office to check her email, and never got to the lunch; she spent New Year's Eve in the office, rather than at any of the three parties to which she had been invited. When Morgenstern probed the reasons for this behaviour she admitted that she found her work very relationally draining, and that she couldn't face spending time with her family and friends who she found very emotionally draining. She felt that she was continually giving of herself to others, taking on the roles of "caretaker, therapist, friend, boss, mother" in her relationships, and that none of them built her up. This care-taker role had become an integral part of her self-image and she found it difficult to imagine a different existence.

Morgenstern – pg.9 of 61
Morgenstern suggested that she attend the next meeting of a supper club which she had joined over a year previously (but had attended only one supper!) and make a concerted effort to avoid giving advice. If someone described a problem, she was to turn the conversation to a similar problem in her own life, rather than trying to provide advice or a solution. On the day of the meeting, she spoke to Morgenstern and was clearly very nervous about trying to behave in such a radically different way. Morgenstern realised that her caring was not necessarily a bad thing, so modified her suggestion, and proposed that Sara behave as she normally would if someone discussed a problem, but that she should try to ask for help or advice for an issue of her own. Specifically, and very appropriately, she was to ask for advice on maintaining a social life. Sara felt more comfortable with this suggestion and followed it through. The results were excellent: Sara had felt comfortable in her usual role, and was pleasantly surprised that the group had reacted in a very positive way with her "issue", and it sparked some vigorous discussion. She was also amazed at how zealously some people guarded and planned their private lives (and yet were very normal!). Since this breakthrough Sara has been able to relax and enjoy herself more (her coworkers have even noticed her increased productivity and happiness), and has found that she has even more energy to devote to helping others.

Most people are not in such extreme circumstances, of course, but it is important to consider the possibility that negative factors in your private life are driving you to work longer hours than necessary. Of course, for some people, the problem is passion - they genuinely love what they do. In such cases, it is important to plan to spend time with those who are important to you in order to maintain healthy relationships.

If you find your work more appealing than your personal life, Morgenstern suggests some practical tips:

- Think of creating a personal life as an investment in your work. The increased levels of energy and productivity that a better balance can bring will usually benefit your work. Do it for your clients, boss, students, etc.!

- Ask yourself what you are avoiding. Either deal with the issues or find alternative ways to spend your time away from work. If you're lonely, schedule activities with friends. If some relationships are draining, spend time with other people or on activities like exercise or hobbies.

- Keep a fun/leisure log. If you have not been in the habit of spending time on yourself, you may need to monitor your activities to discover which ones are most fulfilling.

- Measure your doses. Don't rush into a major lifestyle change - "make subtle, gradual changes". Find something you think will be relatively easy and try that. Take a weekend off, before building up to a two-week vacation.

- Carve out one weekly oasis from work. Find one activity that you really love, and enjoy the anticipation during the days leading up to it.

- Picture success. Use visualisation techniques to imagine how it will feel to be fit again, or to be able to enjoy real quality time with your family/friends. Set yourself goals and timelines for achieving these.

Work As Duty

The second reason some people resist finding a better work/life balance is due to an over-developed sense of duty, "a deeply ingrained work ethic". Not working engenders deep-seated feelings of guilt. The underlying reasons for this mind-set may differ. For some it is pride in working hard, or in being the office problem-solver. For others it may be rooted in issues of self-worth, and the sense of fulfillment that work can bring. "Did you grow up learning that work is good, leisure is wasteful?" This was the problem for Rita who we met a few weeks ago (see "Making Work Work 2"). When Morgenstern probed her reasons for working so hard, she confessed that she was afraid that "the whole company would fall apart" if she wasn't there (and then laughed at herself as she realised how absurd this sounded!). As absurd as it seems, it was coming from a deep sense of integrity and loyalty to the company. Slowly Morgenstern helped her to let go of some small tasks, and the company didn't crumble to pieces. Then they worked up to something more substantial: the lengthy reports that Rita prepared after every staff meeting. Morgenstern suggested that someone else could type up a one-page summary of the meetings, highlighting the decisions taken and the actions to be done. To Rita's relief this actually turned out to be more useful than the time-consuming reports she had been producing. However, Morgenstern felt like she was digging a hole in sand - as soon as Rita relinquished one task, there were several others waiting to fill the fresh gaps. The next step was to suggest that Rita take a weekend off, leaving at 3:00pm on the Friday. "Even if the work isn't finished? she gasped!" Morgenstern pointed out that the work was never done, and that she needed to take the plunge. They got Rita's assistant to
help with nudging her out of the door, and let her boss and colleagues know she would be leaving early. She managed to get out of the office by 3:30pm and headed out into the country with her husband for what turned out to be a wonderful weekend. That was the turning point as Rita realised that she could spare some time for herself and her family. As she started to enjoy a far more social life, she realised that her company was running fine even with a little less attention from her, and, more importantly, "her sense of fun and energy returned".

In time, Rita dropped her daily working hours from twelve to nine, started to going to the gym again, and made time for twice-monthly theatre outings with her husband and regular get-togethers with her friends. Morgenstern noticed that she began to "glow, ... coming across relaxed, and actually looking like she was having fun at work". At the same time, despite the 25% reduction in her working hours, her work was still getting done because she "is happier, more energetic, and more clear-minded at work. By getting a new lease on life, Rita has become more productive than ever".

Again, Morgenstern provides some practical tips to assist if you have an over-developed sense of duty.

- Consider the possibility that your perceptions may be incorrect. Working long hours does not necessarily mean that you are being productive. Often some time off will allow you to resume your work feeling rested and with a far greater level of productivity. Stop working before you reach the "wipeout zone".
- Let other people solve problems too. Learn to delegate where appropriate. (Morgenstern returns to this topic later in the book).
- Try neglecting one small task. There's no need to be a martyr. The task may actually be quite unimportant, or someone else may be able to do it.
- Get a buddy at work who will leave with you. Find someone who will help you to get out of the door at the end of the work day (if that person also has an over-developed sense of duty, you will both be benefitting).
- Tend to your own crisis before the organisation's sometimes. Your "crisis" simply be your health, or a relationship. Leave the office at the end of the day with whatever last minute "emergency" has just landed on your desk to be dealt with the next morning. Put yourself first.

Poor Planning

A third reason for neglecting your work/life balance might simply be a lack of organisation. You need to plan your work, so that the most important tasks are dealt with timeously and don't become last minute crises demanding heroic overtime commitments. Be aware of people (your boss or coworkers) who may suddenly drop tasks on you at the last minute and try to preempt these. Warn such people that you will be unavailable after a certain time, and stick to it.

The other facet of this issue is a lack of planning of your personal life. If your personal time consists solely of late night dinners alone watching reruns on TV, or facing the drudgery of household chores, you need to use some of your organisational skills on yourself, or spending more time in the office will definitely be more appealing! One of Morgenstern's clients had exactly this problem. Rob hired her to help him get more organised, and she spent a lot of time helping to work more efficiently. Three months later he was still working late hours after everyone else had left the building. He admitted to Morgenstern that he could leave with everyone else, but that "there's nothing really fun to leave for". He had forgotten how to have a good time. Morgenstern worked with him to identify activities that he had enjoyed in the past and to consciously schedule these activities for his private time. Once he had something to look forward to, leaving the office at the end of the day suddenly became a lot easier.

If you fall into this category, the following ideas may be helpful.

- Start your evenings and weekends with a self-renewal activity. This could be as simple as listening to music after work, with a cup of tea or a glass of wine, or going for a walk or other form of exercise, or booking a manicure or massage for Friday afternoon.
- Plan something time-sensitive immediately after work. Book yourself into a class, or make an appointment for a meal with a friend. "A nonnegotiable deadline will get you out of the door on time".
- Fill in the toughest blanks first. Schedule activities for the times you are most likely to be at a loose end (e.g. immediately after work, or weekend nights).
- Prepare the people you work with. If people have become accustomed to being able to find you at work after hours you may need to warn them that you are trying to leave at a more normal time.

Morgenstern – pg. 11 of 61
- Set an alarm. Use your computer or cell phone to give you a reminder an hour or two before the end of the day to start wrapping up your work so that you can leave on time.
- Be prepared. If you have to work odd hours (e.g. evening or weekend shifts) you may need to schedule your personal life particularly carefully and well in advance.

Company Pressure

Some jobs (e.g. legal or investment banking) place a high premium on "face-time" or "billable hours", which can lead to exaggerated demands for time on the job. While that is probably not the case for most readers of this summary, Morgenstern does provide some helpful tips for people in these situations.

- Understand resistance. Colleagues may be resentful if you start to carve out time for yourself, or negotiate special conditions. Reasons for this may include "their own fear, their inconvenience, or their own .. wish to have a different balance for themselves".
- Stick to your guns. To use a metaphor: you may need to be flexible about the route, but you should stand firm on the destination.
- Remember your value. In discussing your desire to spend less time in the office with your boss, remind him or her of what you contribute to the organisation - "your talent, expertise and efficiency".
- Focus. When you're working don't allow your personal life to distract you (except for genuine emergencies, of course). Conversely, let your voice mail take messages when you're on personal time.

In most organisations, there will be periods when work demands are higher than normal, and everyone may need to make some sacrifices when this is the case. Many organisations (e.g. universities, magazine publishers) have cyclical demands where certain times of the month/year are particularly busy. "But even during times like these, you need to periodically let go and regrab, finding some way to restore your energy and recharge your battery so that you can keep on producing".

In closing Morgenstern notes that the exact form of a good work/life balance will vary from one person to the next. However, "everyone needs to feed all aspects of their being (physical, psychological, and emotional) in order to stay healthy, energized, and [productive]". She also notes that circumstances will arise that make keeping a healthy balance difficult and one needs to be prepared for life's curve-balls, and to guard your balance from "them" and from yourself. Take the plunge, "break through your resistance, embrace your personal life, and balance your life with PEP".

Some things to think about:
1) If you feel that your work/life balance is lacking, is this because of "passion or avoidance"? Are there relationship problems or difficult issues at home that you need to address?
2) Which of the three reasons (escape, duty, lack of planning) for neglecting your personal life are you most prone to? Which one of Morgenstern's practical tips could you try in the next week to help with this? Do it!

Develop an Entrepreneurial Mindset

The next chapter of Julie Morgenstern's book "Never Check E-Mail in the Morning" turns to the second competency of developing an entrepreneurial mindset. In this chapter she explores the idea that you are in control of your career and should approach it like an entrepreneur.

Morgenstern opens with the observation that the modern world of work is very challenging. The pressure to perform and to improve, in the face of rapid changes that often lead to mergers, layoffs and similarly stressful situations is huge for many workers. Jobs often seem very impermanent and job definitions change rapidly. Even in academia, which is largely immune to many of these issues, the nature of work has changed quite dramatically over the years, with increasing and changing demands. "The new world of work is defined by a sense of fleetingness, interchangeability and insecurity".

For many people this situation can lead to fear: of change, of irrelevance, or of losing your job. However, you were appointed in your current job because you had something to offer the organisation, and you need to "understand that value, cultivate it, and think far beyond any one boss, job, or even industry that you've ever been involved with". You need to grasp your sense of worth in the workplace. Morgenstern argues that gaining this perspective provides a great opportunity, "to learn, grow, and develop new skill sets. You can live powerfully, with deep job satisfaction", not because your job has changed, but because your perspective has
changed. She sums this up as needing to approach your job like an entrepreneur.

An entrepreneurial mindset is probably not most people's instinctive reaction to their work situation, but Morgenstern suggests that you need to manage your career like a business that you control. Your employer is your client - "you are the owner of a service-based business where you must meet and exceed customer expectations, adapt to the needs of the marketplace, and stay competitive by offering something unique". An important aspect to this mindset is to move from a victim mentality to a control mentality. "No one and nothing has control over you. It's your career, and you are free to fix it and direct it in any way that you like". You chose your job and you choose what you make of it. If, despite your best efforts to find fulfillment, you can't make it work, then your are free to look for another, more fulfilling job (or a better client, in the entrepreneurial analogy).

Morgenstern is quick to emphasise that she is not suggesting that everyone becomes a self-employed entrepreneur, but that people should take personal responsibility for their career development and for their fulfillment at work. She points out that the benefits and stability of working for an organisation suit many people far better than the risks involved in running their own business. "But we all have the aptitude to take control - to invest in ourselves and make decisions based our own values, interests, and abilities, to the benefit of ourselves and our employers". Like a roller-coaster ride, the fast-changing nature of modern workplaces and adopting this mindset can be scary, but it can also be exhilarating, even fun. Morgenstern gives some examples of people who have taken specific skills and used them in quite different areas: a journalist who became PR manager for a school; a plastics production manager who became a scenery designer.

Strategy #4: Embrace Your Choice

The pressures of work (recalcitrant students, tight budgets, increasing bureaucratic demands, etc.) can leave one feeling trapped and demoralised. However, one needs to shift the focus from what is wrong with the current circumstances to what can be controlled. (Stephen Covey uses a good illustration of two concentric circles: the inner one is labelled the circle of control, and the outer one the circle of concern. Focusing on what is in the ring between the two circles is fruitless and demoralising - one needs to shrink one's circle of concern to what can be controlled, or find ways to expand the circle of control to encompass more of the concerns). In entrepreneurial terms, you need to take ownership. "When faced with a dilemma, the entrepreneur gets busy fixing the problem, instead of wasting valuable time and energy blaming or complaining". One way of doing this is to ask yourself what you get out of your job (besides the salary) - why are you doing what you do? Different people will have different motivations, but there must have been something that drew you into the job in the first place. "Your first task is to remember what that reason is and embrace your choice fully". Adopting this mindset will provide a sense of purpose, empowerment, even dignity in your work. It's something you choose to do, not something that you are being forced to do. As mentioned, your reason for choosing your job will generally not be the same as anyone else's, and there are no right or wrong reasons - your reason is your reason. Morgenstern lists some reasons that have been identified in various studies:

- Friendship: many people have strong bonds with their coworkers, providing a sense of community and belonging (the Vital Friends series in 2007 covered this aspect).
- Autonomy: many people enjoy the challenge and the satisfaction of managing their workload themselves. (This has always been a major advantage of academic work for me personally - I sometimes joke that it's the next best thing to being your own boss, as there is a lot of scope for developing courses in ways of one's own choosing, let alone the scope for self-directed research).
- Challenge: for many people scope for stretching and developing themselves is a high priority.
- Meaningful work: many people will take a lower-paid job for the satisfaction of doing something that they find fulfilling (again, I think academia is a good example, but vocations like teaching and nursing are also good examples).
- Leadership: having a leader/boss who "makes employees feel valued... is trustworthy, a good motivator and coach, and flexible in solving problems" is a major factor in staff retention (and vice versa).

What if it is THEM? In a side bar, Morgenstern discusses how to cope when the work situation has changed dramatically (either due to systemic changes or promotion). Her advice is to try to reconnect to your original reasons for joining the organisation or to find new reasons. As an example, she tells the story of an editor who entered his profession because he loved to read and wanted to play a part in producing books that would
change people's lives. In time he found that he had less time to spend on "thoughtful editing of meaningful books" as the business aspects (meetings, marketing, etc.) of his job took more time. His solution was to "open [himself] to discovering and enjoying the business side of the industry".

What if it's YOU? Some people have been doing the same job for so long that they feel there is nothing left to learn - the job has grown boring. Morgenstern's solution here is to find one new thing to master. As an example, she tells the story of a building code inspector, who had been doing his job for 15 years and knew it all. However, when he expanded his thinking a little, he realised that he could learn about the building codes that applied in neighbouring areas and could also use his extensive knowledge to teach others. One can ask for a new project, or develop new skills in most jobs.

What if it's YOU? In another side bar Morgenstern discusses the problem of being genuinely stuck in a job, and dependent on the salary. If that's your only reason for being in the job, then focus on it, and what it provides (security for your family, possessions, etc.). "As long as you're getting _something_ from your job, you are one up on the situation".

Use Your Sense of Choice to be More Optimistic on the Job

Most jobs have some less pleasant aspects, but focusing on the positive reasons why you chose that job will help you to maintain a more positive outlook. (Conversely, we've all dealt with people who clearly hate their jobs - they are not usually very pleasant to deal with, and do not serve as good representatives of their organisations!). A negative attitude will do you no favours in the workplace. The negativity tends to spread to coworkers, dragging the whole workplace down. From the entrepreneurial perspective, making your client feel bad about using your services is a bad idea! "You might not love everything about your job, but as long as you feel you are choosing to stay, rather than being forced to, you will feel your power". An important aspect of this is to ensure that you feel that you have options. Morgenstern suggests some practical tips for gaining this sense of control.

- Create a financial cushion: save up so that you have six month's living expenses on hand. Even if you never have to use it, knowing that it is there will provide "a sense of freedom and safety".
- Use current job challenges to enrich your resume: look out for opportunities to expand your skills, and be conscious of skills you may be developing almost incidentally (e.g. if budgets are tight, consider how you are coping, and note the skills - creativity and innovation - that you use to manage in this situation). Even learning to cope with a difficult boss can be presented as valuable people skills when looking for another job in future. "Change your attitude. Convert challenges into marketable skills".
- Study and develop knowledge: "take classes, join professional associations, attend conferences". Most companies provide opportunities for mentorship, development and training, but even if they don't take control and do it for yourself. The chances are your current employer will appreciate the efforts you are making to develop your skills, but even if they don't the additional experience will leave you in a stronger position when looking for another job.

A closing quote:
To survive and thrive in the new world of work, you need to stop being the victim, and start thinking and acting like an entrepreneur.

Some things to think about:
1) "No one and nothing has control over you". Do you agree with this statement? Why?
2) What keeps you in your job? How can you reconnect with, or strengthen, that fundamental motivation?

Develop an Entrepreneurial Mindset: Strategy #5: Cultivate Your Value

This week we come to the second of the strategies for developing an entrepreneurial mindset from Julie Morgenstern's book "Never Check E-Mail in the Morning". This strategy focuses on how one can develop a strong sense of self-worth through understanding one's value to an organisation.

Any successful entrepreneur knows that, in order to succeed, they must provide a product or service that is needed, with a unique added value (e.g. level of service, quality, personal touch, etc.) that sets the product/service apart from similar offerings by other companies. Morgenstern notes that similar dynamics
apply to the employment relationship: you should offer a service to your employer that meets the employer's need, preferably with added value (exceeding expectations). This determines your value to the organisation. This value is comprised of the full set of contributions ("your strengths, knowledge, talent, experience, and expertise") that you make at work. Having a strong sense of your own value will help you to find the self-confidence and self-belief to navigate the sometimes unclear waters of the modern workplace where change is so prevalent. "When you know your value in the bigger context, you can be nimble, adjusting your approach as needed..., and not be outrun by the constant variations". Often the workplace will not recognise your value (at least not explicitly) and you should try to determine this for yourself. Fortunately, Morgenstern provides some assistance.

Examine the Big Picture

We often overlook some, perhaps many, of our strengths. We are probably aware of a few key ones, but there may be many others that seem obvious or trivial to us, and hence are not given the prominence in our thinking that they deserve - we underestimate ourselves and our contributions. Morgenstern suggest that you "think back over the course of your working life. What unique talents, skills, experiences, attitudes, and connections do you bring to the table?" She suggest noting down any specific achievements, no matter whether large or small (e.g. anything from a formal award to a thank-you note from a student or colleague). Try to step back and see the bigger picture, particularly which skills are potentially transferable to new situations. She gives some examples, ranging from a sense of humour that provides a welcome relief in the workplace during tense situations, through to being a good problem-solver, who can wrestle with a problem until a solution is found. The key fact about these kind of characteristics is that they are an inherent part of you - they will be with you in any job or in any situation.

Morgenstern provides the following list of questions to help in identifying your value, and suggests you answer them relatively spontaneously. Try to "think in broad strokes".

1) What are your unique skills and talents? Where do you excel?
2) What length and breadth of experience do you offer?
3) What industry contacts and connections do you have?
4) What is your level of productivity? How much do you get done in a day?
5) What is your attitude/work ethic? Are you willing to go above and beyond the normal effort?
6) What results have made you especially proud?

Answering these questions will help you start to become aware of your value. Keep the list handy and add to it as new thoughts come to you. Ask trusted colleagues, or close friends and family members, as they may have noticed things that you have taken for granted. She also recommends the book "Now, Discover Your Strengths" by Marcus Buckingham and Donald Clifton.

Examine the Current Picture

The second step is to focus on the specific contributions that you make in your current job. "What makes you particularly valuable to your employer _now_? Where are you making your greatest contribution currently?" These could be in the area of so-called "hard skills" (specific technical competencies) or "soft skills" ("the _way_ you do you job"). For example you might be really good with handling difficult people, or really good at analysing complex data. Again, you should try to identify your value in the following areas:
- Skills and talents
- Attitude/work ethic
- Experience and contacts
- Results/productivity

Compare your answers here with those for the "big picture" assessment above. Do any skills really stand out?

Some things to think about:
1) What skills have you identified as specific strengths? How can you build on these?
2) What connections and contacts do you have that you might be able to make use of in your working situation? Have you considered these as unique contributions before?

**Develop an Entrepreneurial Mindset: Strategy #6: Trust Your Truth**

The third of the strategies for developing an entrepreneurial mindset from Julie Morgenstern's book "Never Check E-Mail in the Morning" deals with being honest (with yourself and your employer) about your unique strengths. It has some similarities with the strengths-based approach espoused by Marcus Buckingham.

She starts this section by noting that people who have a realistic self-image, who know where their strengths and their weaknesses lie, are generally more confident. "Secure in their identity and role, they are able to more easily navigate the natural challenges in the workplace with more precision, accuracy, and uniqueness". They also don't feel the need to pretend that they know the answers when they don't.

If You Have a Question, Ask

This relates to the last point: being prepared to admit when you don't know something. Many people have a problem with this, assuming that it will make them look stupid or incompetent. However, Morgenstern repeats the old adage that there are no stupid questions (especially in the very dynamic modern working world). Just as an entrepreneur questions clients in order to determine how best to meet their needs, so an employee should not be afraid to ask how best to do their job. Clarifying expectations will allow you to work more efficiently and produce results that are better aligned with the employer's goals. As an example, Morgenstern notes that a request to make a document more clear, might mean quite different things to different people: someone might want an abbreviated summary of the current document, while someone else might want it expanded with more context and explanation added. Another example: someone's idea of "urgent" might mean within a few hours, while for someone else it might mean early next week. Usually people will gladly answer these kinds of questions: it means that they are more likely to get the result that they want, and it may even help them clarify their own thinking.

What if it is THEM? In a side bar, Morgenstern discusses what to do if your boss is too busy to answer your questions. She suggests asking other people (either inside or outside the organisation) for advice, particularly people who may have done similar work. Try to narrow down your list of questions to the essentials (two or three) and send a brief email to your boss - "keep it short and sweet". If you're preparing a document, provide a draft or an outline (well before the deadline) and ask for feedback about any changes that might need to be made.

If You See Another Way, Share Your Ideas

Some people are reluctant to share ideas in meeting situations for fear that the ideas might be considered silly and they will look stupid. Sometimes this happens only for someone else to make the suggestion and for it to be hailed as a great idea! Morgenstern's advice is to take the risk: "Take your ego out of the way". If your idea isn't accepted, be gracious rather than offended - your contribution is likely to have helped clarify the situation and the available options, and steer the meeting towards the final solution anyway. The alternative is to become a "yes-man" with no fresh ideas of your own, which is probably not what your employer wants.

If You Won't Be Able to Deliver, Say So!

Nothing is more frustrating for an employer than finding out at the last minute that a project will not be completed on time. If you need an extension or assistance, ask for it (in good time). Being passive in cases like this is really not helpful. If you are asked to do something that does not match up with your strengths, be prepared to say so, and to make suggestions on how the work could be done more optimally. Trying to hide problems in these kinds of situations will almost always result in the truth coming out eventually anyway.

Is the Value You're Providing What Is Actually Needed?

Morgenstern suggests that you list the "top five qualities you think your job requires", then list the strengths that you identified in your "big picture assessment" (see last week's summary). Evaluate the matches between your strengths and your job requirements. Are there any mismatches? Are there strengths that you are not
getting an opportunity to utilise? If so, how could you try to find a way to utilise them in your job? Try to find ways to use your strengths to address the areas of mismatches. Try to develop your skills and abilities in ways that will allow you to better meet the requirements of your job.

Morgenstern tells the story of one of her clients, Audrey, who was faced with a sudden change in the organisation and who had to adapt very rapidly. She was employed as a "brand manager" and this involved her in a lot of marketing and client-facing work: she served as the "public face" of the company, which she found very stimulating. However, the company appointed a new CEO who took over the PR functions that Audrey had been doing. Morgenstern challenged her to look at new ways in which she could contribute to the company. Were there other "latent skills, talents, and contributions she hadn't yet made?". Audrey turned her attention inward to the staff of the organisation, and discovered an exciting and challenging new role for herself as a mentor, taking advantage of her long service with the company and her detailed knowledge of it.

Some things to think about:
1) How easy do you find it to admit that you don't know something?
2) How well do your strengths match up with your job requirements? How could you apply your strengths to any areas of mismatch?

Develop an Entrepreneurial Mindset: Strategy #7: Develop Your Vision

The fourth and last of the strategies for developing an entrepreneurial mindset from Julie Morgenstern's book "Never Check E-Mail in the Morning" deals with the important topic of vision.

An entrepreneur, particularly one who is just getting their company started, will usually be prepared to do any task, no matter how menial, that needs to be done. They will answer phones, sweep floors, deliver parcels, manage marketing, or design brochures if it needs to be done. They probably don't enjoy every task they have to do, but they do them enthusiastically and without letting their pride keep them from the lowly tasks. The reason? They usually have a strong vision for the company that they are trying to build and will do whatever it takes to get there. "They see the connection between the individual chore... and their ultimate objective".

Having a strong vision provides a sense of purpose, gives a context to work, and lends significance to tasks, even the most mundane (Morgenstern gives the example of stuffing envelopes for a charity dealing with AIDS or breast cancer).

Having a clear vision helps speed up and clarify the decision making process. If you have a clear idea of the ultimate goals, dealing with the problems that arise en route is much easier - one can focus on the unchanging goal while adapting the techniques and tactics used to get there. Every experience becomes a valuable step in the journey - filtered through the lens of vision, every situation has something to offer (even if only a learning moment).

Articulate Your Personal Vision

The first step is to get a vision for your life. "What drives you to be where you are? What... keeps propelling you forward? What is the vision that inspires you?" This approach is supported by many authors, including Stephen Covey who sees this as a central step in his Seven Habits of Highly Effective People. Morgenstern advocates a fairly light, intuitive approach to identifying your personal vision, suggesting that you take a few moments to think about your goals, focusing on what comes to mind first, rather than any deep, involved process of introspection: "... it doesn't need to be complicated. What does your gut tell you? ... What's making you wake up every day and go to work?". You may have a grand goal like becoming an expert in your field, or may simply want to be a role model for others. You may be focused on improving the circumstances of others, or on becoming wealthy enough to retire early. You might want to emulate a personal hero or role model, or be determined to prove someone who belittled you wrong. "Whatever compels you, articulate it - it will grow stronger and more inspiring as you acknowledge and embrace it". Morgenstern suggests trying to think of your entire career, and not necessarily just in terms of your current position.

Adopt Your Company's Vision

If you are struggling to identify a personal vision, you may find it helpful to reflect on the vision of your organisation. While this may help you clarify your own goals, it will definitely help you focus your time and
energy at work. There is a potentially valuable synergy that can apply here: "Your own vision will become more clear to you once you see how it can feed your employer's goals, and how your employer's goals can feed yours. It's a powerful feeling to have all the resources and brains of your employer promoting your own vision".

See the Connections
Combining your personal goals with the overall vision of the organisation is helped when one can recognise the connections between the everyday tasks and the organisation's vision. Morgenstern gives the example of a salesperson updating their database of contacts. In itself that is a very mundane, boring task, but viewed from the perspective of enabling the salesperson's work and the value of having an efficient mechanism for monitoring leads, it assumes a greater significance. Morgenstern gives, another, personal example. As a student, she took a campus job assisting in an admin division. Her manager took her into a backroom with a photocopier, gave her a stack of newspaper clippings and told her to make 20 copies of each, with no explanation. She spent hours alone in the room, mindlessly copying articles with no idea why this task was necessary. With hindsight, she realised that this must have been part of the university's publicity function, and that the copies were presumably used to assist in raising funds through emphasizing the reputation and the national profile of the university. Had her manager taken a few moments to explain this, her mundane job would possibly have been a lot more fulfilling. She suggests thinking of the most tedious task that you have to do as part of your job - how does it contribute to attaining the organisation's vision, and how does it contribute towards your own personal vision?

To help with this, she suggests a few practical tips:
- Ask your boss. Find out what his/her priorities are, how he or she thinks you should be spending your time, etc. What are the departmental goals?
- Get a copy of the organisation's annual report (or similar document). This will shed light on the organisation's vision, mission and strategic objectives. Is there some aspect of this that particularly inspires you?
- Find a role model. This may be someone close to you, or someone you have never met (biographies and documentaries can provide inspiring examples). Morgenstern notes that such role models should be seen as providing inspiration, not as a measuring standard for your own performance.
- Picture success. Reflect on past successes. These might be things like a major award, a significant promotion, or a simple thank-you from a student, customer or coworker. What led you to that achievement? Review such highlights when the going gets tough for a source of inspiration and perseverance.
- Be fearless. Many people struggle with fear born of perfectionism or the possibility of failure. You will need to overcome these fears if you are achieve your goals.

Morgenstern returns to the story of Audrey (introduced in last week's extract), who was demotivated by her new boss who took over the publicity functions that she had previously done and found very satisfying. While trying to find a new vision for her own life, she focused on the company's goals. While this was a difficult, sometimes painful, process, she took control and assumed responsibility for herself. Eventually, she came to formulate an "interim vision": "to improve her skills in working with a difficult personality". This positive viewpoint allowed her to persevere through the bad treatment dished out by her boss, and gave her a goal of improving her personal skills - likely to be a valuable asset in her ongoing career.

In closing this chapter on developing an entrepreneurial mindset, Morgenstern summarises the lessons of the chapter as follows:

You have the skills to take the reins and guide your career in the direction you desire. Becoming aware of your own choices, value, truth, and vision will inspire you at work every day.

Some things to think about:
1) What is your personal vision? (In Morgenstern's words: "What drives you to be where you are? What...
keeps propelling you forward? What is the vision that inspires you?"). You might like to work through something like Stephen Covey's Seven Habits to help you formulate a personal vision statement.

2) How can you find alignment between your organisation's vision and your own personal goals? What are the "connections" between your daily tasks and the high-level vision of the organisation?

Choose the Most Important Tasks

The next chapter of Julie Morgenstern's book "Never Check E-Mail in the Morning" starts to focus on time management and prioritization.

In the middle of a busy day with various tasks clamouring for your attention, it is sometimes difficult to decide which one you should focus on first. Some people will gravitate to the most urgent task (not necessarily the most important), and some will try to time-slice, spending a little bit of time on each task. "Workers who can consistently decide with clarity and ease which tasks are most important when under pressure are the most prized in every organization". They are also usually relatively unruffled by the barrage of things requiring their attention. The goal of this chapter is to provide some tools for helping to make wise decisions regarding what to do next. It has some aspects in common with David Allen's "Getting Things Done" (StaffDev in 2003/2004) and Stephen Covey's Seven Habits. It also leads naturally into the next chapter of Morgenstern's book which deals with time management.

Strategy #8: Dance Close to the Revenue Line

When faced with a choice of activities, Morgenstern suggests that one should focus on the tasks that are closest to the revenue line. By this she means the tasks that most directly either make or save the organisation money. What task will potentially have the greatest (positive) impact on the organisation's finances?

Organisations are typically focused on providing either a product or a service. How does your organisation measure your output or your effectiveness? It might be something like the quantity of items produced, the quality of your work, the volume of sales, the number of clients served, the amount of money raised, etc., etc.

Once you have identified the "revenue line", you can then start to evaluate the tasks on your to-do list in terms of how directly they contribute to the organisation's revenue. There are three aspects to this:

1) Generating income (e.g. attracting more customers)
2) Creating products/delivering services (e.g. making the widgets/giving the lectures)
3) Saving costs (e.g. researching cheaper suppliers)

Morgenstern recommends spending the majority of one's time on tasks that are only one or two steps away from the revenue lines - i.e. that directly, or almost directly, contribute to the organisation's finances. Tasks that are further from the revenue line should not be neglected, but should take a lower priority. She suggests listing your most common tasks and the categorising them as one, two or three steps from the revenue line, then using this scale as a guide to prioritising your time allocation.

Starting with the most important tasks will not only contribute most directly to the organisation's success, but will also provide a sense of accomplishment, reducing the stress induced by a feeling of being swamped with work. Tackling the most important tasks first, will usually also provide the space for getting to the two- and three-step tasks in due time. Clearing the top-priority tasks from your to-do list first also provides some slack when crises arise - the two- or three-step tasks you may need to drop will presumably have less impact that a crisis arising when you are already late on a one-step task.

Conversely, getting bogged down in lower priority tasks is likely to lead to highly stressful pressure, as the magnitude of the important work, still undone, weighs on your mind (consciously or unconsciously) - this is what David Allen refers to as the "psychic stress" or as "psychic clutter" of disorganisation. trying to deal with the psychic stress is likely to impact on your productivity, creating a negative feed-back loop.

If you find yourself turning to lower priority tasks frequently, you might need to need to reflect on why this is the case. Do you dislike the one-step tasks or feel out of your depth? If so, you need to deal with these issues. Finding a mentor might help, or possibly taking a course that will provide you with more confidence.

What if it is YOU? In a side bar, Morgenstern deals with the fact that it can be very tempting to start off the day by dealing with some low-priority tasks - "warming up your day". However, this can lead to a situation
where the low-priority tasks either expand to fill the day, or leave your energy levels and concentration depleted for the high-priority tasks. You need to "choose the important over the quick, the tough over the easy". Getting the one-step tasks out of the way first gives you far more freedom for dealing with the inevitable crises.

Do the Workplace Dance

Morgenstern notes that the low-priority tasks cannot be neglected completely - they run the risk of escalating into crises otherwise. For example, arranging your travel to a conference is probably further from the revenue line than revising the paper, or preparing your presentation, but it needs to be done, and preferably not at the last minute. "Keeping up with the pace and unpredictability of the workplace is a dance - it has a rhythm and a shape". She suggests creating the "rhythm" by focusing mainly one one-step tasks, but interleaving them with a few two- and three-step tasks. She also notes that the time a task takes might not be an accurate gauge of its importance. For example, her own work involves long stretches of time for one-step tasks requiring creativity, careful attention and concentration (e.g. writing, preparing talks), but a financial broker might spend very little time on one-step tasks like processing a new investment, but a lot of time on two- or three-step tasks like entertaining and grooming potential new clients. Your job may also have a cyclic nature where the rhythms vary at different times of the month or year. For some people spending three weeks of the month on the one-step tasks, followed by one week on the lower priority tasks might be the most appropriate rhythm. Whatever your pattern of work, "starting each day at the top and working your way out of every stressful moment will leave you feeling accomplished and centered instead of harried and downtrodden. The energy and relief you'll feel from getting these things crossed off your to-do list will fuel you, boosting your productivity for the rest of the day".

Some things to think about:
1) Perhaps one of the most obvious applications of this strategy in a university context is the pressure to publish papers, due to the government funding model that relatively directly rewards such activity. Do you think this is a good thing?
2) What other activities are one step away from the revenue line in your context? [In a non-profit, service-oriented organisation, the answers to this question are perhaps not all that obvious - a discussion on the blog site might be helpful, if you have any ideas to contribute.]

Choose the Most Important Tasks: Strategy #9: Capture All Your To-Dos in One Place

The next strategy for time management and prioritization from Julie Morgenstern's book "Never Check E-Mail in the Morning" covers material that will be familiar for people who have read David Allan's "Getting Things Done" (GTD) or who were around for the StaffDev series on GTD in 2003/2004. It's a short, but powerful section. She also has a number of side-bars in this section that examine various aspects of having a single, consistent to-do list.

If you are going to be able to choose the most important task at any time, you need to know what your current set of tasks consists of - you need a complete list of to-dos. Morgenstern notes that many people fail to have a single, consistent, complete to-do list - they try to remember tasks, or jot things down haphazardly in multiple places (PDA, Post-It notes, notebooks, the backs of envelopes, etc.). "This haphazard approach results in lost opportunities and misguided efforts. You can choose wisely only if you have everything written down in one reliable place". Which place is not that important - pick a system that works for you (e.g. a day planner, notepad, PDA or PC software).

At one of her presentations, a member of the audience challenged Morgenstern's assertion that she writes down everything. Morgenstern was able to answer honestly that she does follow her own advice in this regard. She notes that people who try to remember everything, rather than writing it all down, often spend quite a bit of time worrying that they might have forgotten something. "Having everything captured in one place will free you to make clear decisions and get a better night's rest".

Morgenstern also notes that the process of writing everything down gives one the opportunity to reflect on how you are spending your time, and the priorities of the tasks you have to do - "by the time you do take
action, you are doing so with precision and confidence”.

What if it is YOU? Some people are reluctant to adopt a written to-do list because their memory used to work well for this purpose. Morgenstern relates the experience of one her clients (a brilliant lawyer) who found she was starting to forget things (possibly her memory was not as good as it had been, but, more likely, the increasing volume of her responsibilities had started to exceed her capacity to keep track of), but was reluctant to admit that she needed to adopt a written approach. Morgenstern encouraged her to get a planner, but the hit to her pride was hard to take. To help alleviate this, Morgenstern suggested that she got a luxurious, leather planner that would be a joy to use, and to consider it as a “new best friend”. It took seven months to adapt, but eventually the lawyer was back to her old efficient self, with the help of the luxury planner.

What if it is YOU? Faced with a bewildering array of choices, you can't decide what system to adopt. Juggling tasks between multiple systems can become a major time-waster, hence the advice to use just one. Morgenstern provides some practical tips to help with making this decision:

- Find the right size pages. A page-a-day calendar/diary gives you more space for daily to-do items than a week-at-a-glance diary. Get a diary that will cope with your workload.
- Thin down your binder. If you want a paper-based system, but dislike carrying around a bulky planner, get a ring-binder version and carry just a month or two with you at a time.
- Get a foldable keyboard. If you're using a PDA but don't like scratching away at its character recognition, get a mini-keyboard for it. You can also enter tasks on your PC and synchronise them to your PDA (I often do this if I'm at my desk when a to-do lands).
- Combine PDA and paper. Keep a small notepad/diary in your PDA's carrying case.
- Use an assistant. If you are fortunate enough to have an assistant, get them to keep your tasks up-to-date using a sharable software package.

What if it is THEM? Some companies may require their employees to keep their schedule on some shared medium (perhaps a whiteboard, or shared calendaring software). If the company's choice of system conflicts with your preferred choice of tool, you may need to set aside some time to regularly update the company system from your own.

And a closing quote:

Running around putting out fires without thinking of their value to the organization is the surest way to burn out and waste an enormous amount of time doing the wrong things.

Some things to think about:

1) Have you ever tossed and turned at night, worrying that you might have forgotten some task you need to do?
2) What (if any) to-do system do you use? Does it capture everything? What system would suit you best for capturing all your to-dos?

Choose the Most Important Tasks: Strategy #10: Remember the 3 Qs and 4 Ds

The next section from Julie Morgenstern's book "Never Check E-Mail in the Morning", dealing with strategies for time management and prioritization, provides some practical advice for managing a to-do list in the face of many tasks and urgent interruptions.

Strategy #9 recommended keeping all your to-dos in one place, which is critical for decision-making. However, even with this in place, you can face conflicting priorities, or urgent new tasks that arrive unannounced. Often we seem to be besieged by a mountain of tasks, all important, all "one step from the revenue line", etc. How do you manage your task allocation in these situations? Morgenstern provides the 3 Qs and the 4 Ds as a method for dealing with these situations. The 3 Qs are three questions that can help sort out conflicting priorities:

1) How long will it take?
2) What is the return on investment (ROI)?
3) When is the deadline?

Question 1: How Long Will It Take?
This question often needs to be asked in conjunction with the second one: given the time available, how long will each task take, and what is the relative benefit of each of them? You can then "choose the task that takes the least amount of time but yields the biggest payoff first". Morgenstern notes that many people don't consider how long a task will take when trying to schedule it (issues like easiness or enjoyment often drive our thinking). Accurate time estimation is invaluable in trying to schedule your daily activities, and provides a welcome element of objectivity.

Morgenstern provides some ideas for getting accurate time estimates, including consciously monitoring the time you spend on common activities, asking colleagues who do similar tasks, and discussing time estimation with your colleagues as a team ("Make asking how long it will take protocol for your department or company").

Question 2: What is the ROI?
As already mentioned the potential value of a task needs to be evaluated in conjunction with the time required. For example, completing several short tasks, each with medium value, might be preferable to tackling one very long task with a larger value. In some organisations, the concept of value might be explicit (e.g. Rands earned on sales), in others it may be more intangible and possibly harder to judge.

Question 3: What is the Deadline?
When you are faced with several tasks, all requiring similar time to complete and all providing similar value, you should choose the one that is due first. While this might seem obvious, if one doesn't ask the question explicitly it is easy to fall into the trap of favouring easy/fun tasks over others that may have shorter deadlines. The importance of clearing the tasks with the closest deadlines become particularly apparent when unexpected interruptions occur - there is a reduced likelihood of a task being rushed too close to the final deadline. "Cover yourself by always starting with the task closer to the deadline, and get that done before moving on".

Letting Go
"The flip side of choosing what's most important is knowing what to relinquish". This is often an area of difficulty for people who don't want to "admit defeat", or to appear to not be coping with their work, or who are perfectionists. Often one's work changes over time as different aspects become more or less important, or as time pressures limit one's ability to provide nice-to-haves. This issue often provokes a strong (negative) reaction from participants at Morgenstern's seminars, for the kinds of reasons already mentioned (pride, fear, perfectionism). However, she notes that the guilt generated by not being able to complete some tasks can exact its own toll. It is to help with managing this "letting go" process that she provides the 4 Ds: Delete, Delay, Delegate, Diminish. She also notes that the point of this is "about increasing your efficiency - not about being lazy or avoiding work".

Delete
Morgenstern suggests taking a very critical look at the tasks on your to-do list. What's the worst thing that will happen if you don't do a particular task? If the answer is "nothing", consider deleting it.

Delay
This is not the same as "procrastinate"! Procrastination is about putting a task off indefinitely. Delaying means consciously rescheduling a task for a specific time in the future. It can also mean delaying a fun, but less "profitable" task until those close to the revenue line are completed, or consciously setting aside a task that requires a high level of attention and/or focus until a time when you will be able to tackle it with the level of concentration that it requires.

Delegate
Again, this can be difficult if everyone in your organisation is busy, or if your perfectionistic streak leads you to believe no one else can do it as well as you. Morgenstern advises: "If there is something on your list that
someone else can do better, faster, or well enough, give it to them". She notes that the overall productivity of the team is improved this way, and allows you to work to your strengths (c.f. Marcus Buckingham).

Diminish
Look for "short-cuts". For example, can you create a template or a macro that will simplify an office-productivity task in future? She gives the example of an advertising executive who always read three newspapers every morning. As his responsibilities increased this became increasingly difficult. Morgenstern's solution was to suggest that he subscribe to a compilation service that would send him the headlines and first paragraph of the articles from his favourite newspapers. If an article caught his attention he could always look it up in the online version of the paper.

A closing quote:
Use the 4 Ds in conjunction with the 3 Qs as often as you can to hone your ability at prioritizing and to increase your efficiency. It's not a matter of being lazy or avoiding work, but rather of ensuring that each task is carefully thought through and had a place to go.

Some things to think about:
1) Are you in the habit of considering the time a task will take when prioritising? If not, what difference do you think it would make?
2) What task(s) on your to-do list right now might benefit from the 4Ds?

Create the Time to Get Things Done

The next chapter of Julie Morgenstern's book "Never Check E-Mail in the Morning" deals with time management, and more specifically with finding the time to get work done (the fourth "competency"). The first strategy in this chapter is the one that led to the title of the book: avoiding email first thing in the morning. Again, this section reminds me of some of Stephen Covey's principles, namely his categorisation of activities into four quadrants, based on the two dimensions of importance and urgence. This leads to the four categories of urgent/important, urgent/unimportant, non-urgent/important and non-urgent/unimportant.

Most people would probably state that they find it very difficult to get through everything that they need to get done in a day, and particularly that they find it difficult to set aside uninterrupted time for focused attention on important tasks. "We work and live in a staccato environment. E-mails, faxes, meetings, crises, and constant pressure create a naturally frenetic cadence to the workday". Many of these tasks (urgent, often not that important) can be handled quickly and easily, but in aggregate they detract from the time required for research, writing, etc. (i.e. the non-urgent/important tasks). Unfortunately, the latter activities are often where we can have the most impact in our work, so the pressure of the stream of urgent/unimportant tasks.

There does not appear to be a strong correlation between hours-worked and work-achieved for many people - we have all been amazed at super-productive individuals who seem to churn out amazing quantities of work without spending their entire lives at work. Are there time management tricks that the rest of us can learn to help achieve this kind of efficiency? Morgenstern advocates a "Morse code" approach: consider your work as dots (short, simple tasks such as email, phone calls, signing off forms) and dashes (the longer tasks that require periods of concentration and focus, such as writing, research, and analysis). You then need to intersperse the dots and the dashes appropriately. This chapter provides four techniques that can help create the space for working on the dashes.

Strategy #11: Avoid E-mail for the First Hour of the Day
Morgenstern reports that most people are shocked when they first hear this suggestion. However, she notes that email is one of the most time-consuming (let's be honest, often time-wasting) activities in the modern workplace. "We interrupt ourselves every five minutes to check our in-boxes, hoping for something more interesting, more fun, or more urgent than whatever we are working on in that moment... E-mail is undoubtedly the world's most convenient procrastination device"!

Email also drives the pace of much of our work, where everything has to be done instantly. We may feel pressured to respond to email immediately (possibly from pride, from other people's expectations, or from a desire to impress the boss, etc.). However, one of the major advantages of email is that we do NOT need to let it interrupt us - it will still be there in an hour's time. "You need to fight this unhealthy speed-freak impulse and press your internal pause button."
Morgenstern advises avoiding email for the first hour of the day - completely! This can provide a huge boost to your productivity, allowing you to spend some of your best time on the dashes. It also helps set a different pace for the day: you are in control and will get to your email when you choose to, rather than letting it dictate the pace. She notes that the avoidance of email needs to be complete - NO PEEKING! The problem with "just having a quick look at what's there" is that it will start to distract you and divert your attention, even if you do successfully manage to pull back from it.

What if it's THEM? In a sidebar she deals with the problem of organisations where email has to be dealt with early (perhaps due to a 24-hour work schedule where overnight requests have to be dealt with first-thing, or when your boss is in the habit of firing off work during the night which he/she expects to be prioritised). In such cases, Morgenstern recommends moving the email-free period to a more convenient time of the day. You need to schedule this time and stick to it. However, she notes that this is not ideal, as it is hard to get back into dash-mode once swamped in dots.

Focus on Your Most Critical Task
Having freed up the first hour of your day, you need to take maximum advantage of the time. To do this you should try to plan ahead. Before leaving the office each day, consider what is on your to-do list, and decide which dash task you will start with the next morning. This means you can get straight into it the next morning, without wasting time trying to decide what to do. "Ask yourself, If tomorrow flies out of control, what one task (not two or three) would I be thrilled to get done - what can I do to earn my salary by [9:30am]?". Making the decision the day before also allows you to "null it over" overnight and even during your commute to work. By clearing your most important task early in the day you will also find that you feel more productive, and energised to get into the rest of your work.

Morgenstern tells the story of one of her clients, Francine, a publicist, who was so unproductive on the big, important creative tasks that she was placed on probation. Her colleagues had grown accustomed to last minute crises, slipped deadlines, and general chaos caused by her lack of productivity. Importantly, it was a lack of productivity that was the problem - she was a hard worker, putting in long hours, but working inefficiently. She was "mistaking being busy for being effective and creative". When pressed she claimed that she was inundated with urgent work that had to be done, leaving no time for the important (but non-urgent) tasks. When Morgenstern suggested that she start her day with an email-free hour, she was horrified. However, Morgenstern suggested that she make an enjoyable ritual: she arrived at work with a fresh cup of coffee, and had her reading material ready on a special desk with a nice reading lamp. She spent the hour catching up with the important trade journals and creating new strategies. While she was worried about her boss' reaction, he was very supportive when she approached him about this new approach (he had put her on probation, so wanted to see an improvement!), and she made it clear that he could still come to her office during that hour if there was something really urgent that he needed her to do. This strategy turned out to be a huge success for Francine: the first hour became the best part of her day. Her confidence improved, her concentration (at other times of the day) improved, and she found herself better able to manage her time throughout the day.

Managing Email the Rest of the Day
Morgenstern notes that email "is not evil". It can be a huge productivity booster, allowing efficient asynchronous communication, and automatically providing a record of interactions. She quotes some research that showed that most people fall into one of two categories: "average emailers", who receive about 20 emails, and send about five per day, and "power emailers" who receive 50 or more emails, and send 20 or more. Interestingly, both groups spend about the same amount of time per day dealing with their email (between 30 and 90 minutes). That's not that large a proportion of the working day, so why do many people feel like they spend far more time dealing with email? The answer probably lies in the frequency with which we check our email, interrupting ourselves to have a look at what's there, even if we don't deal with it straight away. This is not an efficient use of time!

To help cope with this aspect, Morgenstern provides a number of simple tips for managing your email during the rest of the day.
- Keep your email alarm off. Schedule times during the day when you will check email (possibly three: after the first hour, just before lunch and towards the end of the day), rather than letting it interrupt you. Most
emails are not really that urgent!

- Process email fully during your email sessions. If you can reply immediately, in less than two minutes, do so. Otherwise add the task to your to-do list and do it later.

- Say what you need to in the subject line. Many simple issues can be summarised in the subject line (e.g. "Reminder: staff meeting tomorrow at 9:35"), leaving the body of the email blank. If something is urgent, flag it as such, either by writing URGENT in the subject or by using the priority settings.

- Start longer emails with a clear direction of what is needed from the recipient. Giving some direction at the start of the email (e.g. "Please review and advise" or "Can you double-check the figures below?") helps the recipient focus on what is important as they read through the message.

- Stick to one or two points per email. Rather send multiple, shorter messages if you have several things to cover. Most people focus best on emails that are only one screenful in length.

- Create stock answers to routine requests. Use your email client's template facilities to speed up stock replies (e.g. I have one for postgraduate student enquiries - it requires minimal, if any, editing for requests from foreign students for information).

- Limit FYI emails. Preferably note at the start of the email why it is important for the recipient to note and what they should do with it.

What if it's THEM? Some people have to deal with huge volumes of email (100 or more a day), which poses very real problems. In such cases, Morgenstern recommends the following steps:

1) Use filters to sort your email into folders (perhaps by sender), allowing you to prioritise your responses.
2) Have a secretary or PA filter your email, and highlight the one's that you must respond to personally.
3) Time yourself, and explicitly schedule the time for dealing with your email.
4) Use the 4 Ds (Delete, Delay, Delegate, Diminish) from the previous chapter to manage your email.

In closing, Morgenstern notes that email is not always the most appropriate form of communication. Some people do not enjoy someone sending them email from the next cubicle, or office. Sometimes a phone call provides a stronger personal connection, and greater warmth. Likewise, walking down the corridor to speak to someone conveys a sense of respect for them as a person and allows for "proper" communication to take place. As a general rule, email is great for "dots" - brief, routine matters. For "dashes", such as "discussions about creative, lengthy work", meet face to face.

Some things to think about:

1) What's the worst thing that could happen if you ignored your email for the first hour of the day? Go on - try it!
2) How badly does email impact on your workday generally? Which one of Morgenstern's practical tips above might help?

_Beware Multitasking_

We continue with the second section from Julie Morgenstern's book "Never Check E-Mail in the Morning", which deals with the question of how to find time for the tasks you have to tackle. In it she attacks an increasingly common strategy: multitasking.

Create the Time to Get Things Done: Strategy #12: Beware Multitasking

At one time, multitasking was presented as a method for increasing productivity. However, a considerable body of research has now shown that it has the very opposite effect! In particular, multitasking has been shown to reduce concentration on tasks (and thus to affect the quality of the final product), and the context-switching overhead has been shown to be significant (extending the time required by a factor of up to four times). "Severe multitaskers experience a variety of symptoms, including short-term memory loss, gaps in their attentiveness, and a general inability to concentrate... a growing body of scientific research asserts that multitasking can actually make you less efficient, and... less smart". Morgenstern rather advocates focusing on a single task at a time, and trying to group similar tasks together. This is likely to provide a qualitative and quantitative gain in your output.
She returns to the story of Francine, who we met last week. When her colleagues and boss tackled Francine about her work she always claimed she was working on the tasks. Given the long hours she was putting in, they concluded that she must be wasting time. When Morgenstern investigated, she discovered that Francine was trying to handle her workload by doing a little on each task each day. While she felt this gave her a sense of control, Morgenstern likened her approach to that of a circus plate-spinner, desperately running from plate to plate, giving each a little more momentum before dashing on to the next one. While Francine felt that this gave her control, her coworkers were highly frustrated by the fact that her work was almost always in an incomplete state, and not ready for hand-off. Morgenstern was able to persuade her that having half of her projects completed would be better than having all of her projects half-completed. However, retraining herself to see a single task through to completion was not easy for Francine.

Morgenstern provides a couple of helpful suggestions for adapting a style of "sequential processing" rather than multitasking.

Determine Your Concentration Threshold

Everyone has a different concentration threshold: the length of time for which they can focus completely on a single task. She suggests that you try to measure yours by noting how long into a task you start to feel "antsy" - looking for distractions (like email) or wanting to get up from your desk. For some people this threshold can be as short as ten minutes, for others it may be several hours. If yours is short, she suggests trying to extend it up to an hour, by pushing yourself a little further in five-minute increments over a period of time. This won't be easy, but the rewards will make it worthwhile.

What if it's YOU? If you are really anxious that you might be missing something important (email or new developments in your workplace), Morgenstern suggests aiming to work in fifty-minute bursts and then allowing yourself ten minutes to check your email, or get out of your office to check on what is happening with your coworkers.

Focus on the Joy of Completion

Most people get a very positive sense of accomplishment when they are able to cross something off their to-do list or hand-off a completed project to their boss. In Francine's case, she had been focusing on the question of "What can I start?", while this mindset calls for asking yourself "What can I finish?". Morgenstern suggests combining the satisfaction of completing something with your concentration span, by breaking large tasks down into subtasks which can be completed in a single "go". In this way, you get a regular "fix" of completion-satisfaction, reinforcing your focus on reasonably lengthy periods of concentrated effort. For example, if you are faced with a project that might take a full week of effort, but you know you will interrupted by crises, and other urgent tasks that come along, then try to break down the project into subtasks that can be completed in a 30-minute window. In this way, you can easily track your progress towards the ultimate goal, while getting a regular sense of satisfaction as each subgoal is completed. Not only that, but you will have a far clearer idea of how well you are progressing towards the completion of the project if your boss or colleagues ask you. This can also help them to coordinate their work with yours.

Some things to think about:
1) Do you tend to multitask when faced with multiple "projects"? How efficient do you think this is?
2) What is your concentration threshold? If it is less than hour, try to increase it in gradual steps, as Morgenstern suggests.

Create the Time to Get Things Done: Strategy #13: Stretch Time by Planning

We pick up with the fourth competency (i.e. Create the Time to Get Things Done) from Julie Morgenstern's book "Never Check E-Mail in the Morning". The next strategy overlaps a little with some of the earlier strategies in this chapter, and ties up the section well, with some very practical ideas for planning your time. Without adequate planning we run the risk of falling into the trap that Morgenstern's client Francine found herself in: spinning between tasks, without making much progress on anything in particular. We waste time trying to decide what to do next, or context-switching to whatever has suddenly become "urgent" because of an interruption or a sudden thought. "The best way to get your work done, no matter what your job title, role, or position, is to have a plan for your day or week that determines _when_ you do _what_. A to-do not connected to a _when_ doesn't get done". Planning produces many benefits: more time available for important
tasks, a sense of confidence and control, and freedom from "confusion and distraction". Morgenstern then provides a number of practical ideas for implementing a plan.

Group Similar Tasks

This technique helps minimise context-switching. The approach could be as simple as dealing with paperwork in the morning and phone calls in the afternoon, or lectures, email and other "dots" in the morning, and research, reading, and/or course preparation ("dashes") in the afternoon. An advantage of grouping tasks in this way is that you get into the right "mode" of thinking. For example, if you set aside an afternoon to meet successively with all the students you are supervising, something that came up in your first meeting may spark an idea for how to handle an issue in a subsequent meeting. As was the case with trying to find a "quiet hour" in your day, you will need to plan around your own natural energy cycle, and the cycles of your organisation and coworkers.

Work with Your Energy Cycles

If you schedule your work without regard to your natural energy cycle, you run the risk of trying to be really productive and creative when your energy is at its lowest, and wasting your best time on simple dot-tasks. For most people, the early part of the day is their best time, hence Morgenstern's advice to try to set this aside as the email-free, uninterrupted "quiet hour" for focused, creative work. If your natural cycle is different you will need to adapt her plan accordingly. However, the first hour of the day has another advantage, in that it starts you off on the important, substantial task(s) before you get into the choppy seas of the interrupt-driven dot-tasks. It is often difficult to get out of this pattern if one tries to carve out a quiet hour later in the day. If you have to schedule your quiet hour later in the day, Morgenstern suggests some simple tips for breaking out of dot-mode and getting into dash-mode:

- Have a "transition ritual": e.g. take a short walk around the office/building 30 minutes before the start of your quiet hour, and deal with any issues that your colleagues raise before retreating into your quiet space.
- Be consistent: make sure your boss and colleagues know when your quiet hour is, so that they can leave you in peace (if you're lucky the whole organisation may start to adopt a similar pattern).
- If your personal schedule is flexible, take an early lunch and use the "normal" lunch-hour for your quiet hour - you are much less likely to be interrupted. Or, stay on for an hour after work, when everyone else has gone home.
- Shut out interruptions as much as possible: close your office door, switch off the email indicator, switch your phone to voice mail.

You should think of this time as a one-hour appointment. People who need to see you can be asked to wait until your appointment is over. Your boss and coworkers should be pleased with the productivity benefits.

Morgenstern points out that it is important to maintain some spontaneity in your day: sometimes a really good idea can come from an impromptu chat with a colleague. A happy work environment also depends on good relationships between coworkers - time spent building or maintaining those relationships might not be reflected directly in the organisational "bottom line", but is not unimportant.

What if it's YOU? Sometimes you will not be able to stick to your plan because of urgent, important interruptions. Morgenstern points out that your daily plan should be a _general_ plan. If, occasionally, it needs to be dropped for a day while you react to circumstances, don't panic - but get back into your planned schedule as soon as you can.

What if it's THEM? Some people work in an environment where interruptions are the norm (e.g. in a central position in an open-plan office). The next chapter deals with techniques for handling this, but another approach might be to take your dash-work home - perhaps working from home in the afternoons, or for a few afternoons a week to provide some uninterrupted space for dash-tasks.

What if it's YOU? Sometimes the only time you can set aside a "quiet hour" is when your energy levels are at a low ebb. If this is the case, there are some practical things you can do to help mitigate this (some of these are the kinds of ideas for energy-management that Jack Groppel espoused in the "Corporate Athlete" StaffDev series). For example, you could "take a brisk walk, exercise, get up for a stretch, eat a power bar or other healthy snack". Manage your energy level well, rather than pumping your system full of sugar or caffeine.

Some things to think about:

1) What similar tasks could you group together and tackle in one go?
2) When is your best time for dash-work (your optimum "quiet hour")? How can you clear this time for focused, uninterrupted work?

P.S. I have been trying (with reasonable success) to implement the idea of ignoring email and other dot-tasks for the first hour of the day and setting it aside for more substantial tasks and have found it helpful. Specifically, it helped with getting through the exam-marking relatively quickly, and I have made some substantial progress on a paper (and have found that to be self-sustaining - I'm able to grab other blocks of time during the day to work on the paper, because it's on my mind). I can heartily recommend trying this out.

**Control the Nibblers**

We start the new year with the fifth competency from Julie Morgenstern's book "Never Check E-Mail in the Morning". This competency deals with managing the "nibblers": those small interruptions and distractions that rob us of concentrated time for more important tasks.

"The nibblers are distractions that gnaw at our ability to concentrate, threaten our productivity, sabotage our plans, and steal hours every day. These insidious saboteurs, defined here as perfectionism, procrastination, interruptions, and meetings, have likely ingrained themselves into your everyday routine - stealing five minutes here and ten minutes there, threatening to hijack one workday after the next".

Morgenstern draws an analogy between her competencies four (i.e. create the time to get things done) and five, and the process of learning to drive. Competency four lays the basics for time management, just as the initial stages of learning to drive involve the basic steps of mastering the controls, learning the meaning of road signs, learning the techniques for parallel parking, three-point turns, etc. (this is the driving school phase). The next phase of learning to drive (which comes with experience, and, often, advice from more experienced drivers) involves more advanced issues, such as learning to anticipate the actions of other road-users, and how to handle unusual conditions such as driving in heavy rain. It also involves learning how to improve one's style: for example, not riding the clutch, or becoming aware of one's natural tendencies (perhaps to follow other cars too closely, or to drift to one side if distracted). In the same way, competency five provides the "defensive driving" techniques to help take full advantage of the techniques from competency four in real-world situations.

Morgenstern continues with the driving analogy, by noting that we need to become aware of our "blind spots". All of us have certain bad habits that we tend to fall into, or specific nibblers that are particularly effective at derailing our efforts to work effectively. She then lists and describes the four nibblers.

**Nibbler 1: Perfectionism**

She notes that this is a difficult issue to tackle, as upholding high standards is important in almost all jobs. However, perfectionism can lead to a loss of productivity, paralysis in the workplace, and stressful situations.

**Nibbler 2: Procrastination**

This is simple time-wasting, arising from some underlying fear or anxiety rather than any genuine time constraints. It might take the form of repeatedly checking email, spending too long on tea breaks, or time-wasting office tidying or reorganising - "anything to avoid the dreaded task".

**Nibbler 3: Interruptions**

Again, this is a difficult issue, as one wants to be open to interaction with colleagues. However, excessive, unanticipated breaks can have a huge impact on productivity.

**Nibbler 4: Meetings**

Morgenstern notes that excessive time spent in meetings is one of the most frequent complaints from her clients. "Whether you're the leader or a participant, there's little more aggravating than meetings that start late, go on forever, and fail to resolve a darn thing"! Again, meetings have their place - if they're well-run and produce results. Of the four nibblers, this is also the one where one is most at the mercy of others.

While these nibblers are problematic individually, they do also conspire to work together often. For example, one might welcome an interruption that provides some procrastination, or a meeting might run well over time in a misplaced drive for a perfect result.

In this chapter Morgenstern provides some practical strategies for controlling the nibblers, and for getting back on track when such distractions do arise. "Expect the unexpected. Instead of throwing your hands up
helplessly, be prepared with recovery tricks. If you go into denial or succumb to wishful thinking, you will get caught in the same traps over and over again”.

Strategy #14: Crunch Your Container

Morgenstern compares one’s day to the boot (trunk in her language!) of a car, and notes that the previous competencies have been like learning how to pack stuff more skillfully into the boot, and thus ultimately managing to pack in more stuff. However, she points out that this means that you have to cart around more stuff. For this strategy, she suggests something you can't do too easily to the boot of a car: change its size; specifically, make it smaller. "You have the power to choose: How many hours do you want your container to hold? How long is your workday? How long do you want it to be?"

Many people get into a routine of putting in long hours (she refers to a client, Michelle, who always worked 12- to 14-hour days, without breaks for lunch or dinner!). We may pride ourselves on how long we spend working each day. However, our work is about what we achieve, not how long we spend doing it. Morgenstern challenges her readers who are working more than "normal" to cut their working hours by 30 minutes. While this might seem counter-intuitive (isn't it just going to add more stress?), she finds that it is very helpful, providing a new deadline for your work to be completed. This particularly helps in dealing with the procrastination nibbler - you're not going to be inclined to waste time, if you've got a tight deadline to meet.

Talking to colleagues, getting tea or snacks, rechecking completed work, surfing the Internet, over-researching basic issues, managing personal chores during working time (e.g. paying bills), are all examples of possible time wasters. She suggests that you write down your top three time wasters, and start to become conscious of them in your day-to-day activities. "When you see yourself slipping into a less productive mode, stop dead in your tracks and ask yourself these three questions:
- Why am I doing this?
- What is the gain?
- What is the risk?"

Becoming more aware of these "saboteurs" will help you to control the time wasted. She suggests that you keep your list of the top three time wasting traps with you and, when you catch yourself in one of them, note how much time you have spent there. She notes that research has shown that up to an hour a day is wasted for most people. Crunching your container can help minimise this by stealing back some of the wasted time.

She tells how Michelle, working her 12- to 14-hour days was hugely overweight and very unhealthy. After a false alarm when she thought she had a heart-attack, she decided to turn over a new leaf, and leave work by 6:00pm each day to go to the gym. She was very concerned that her work might suffer as a result, but to her surprise she found she was actually far more productive than she had been previously - "by crunching the container of her workday, she got much more done". After cutting down her workday to eight hours, she was promoted repeatedly, and has also managed to start a non-profit organisation to assist women in business. She's highly productive, has almost halved her weight (and maintained her new weight for eight years), and improved her health.

A closing quote: Crunching the container is the best and most efficient way to eliminate the majority of the dillydallying you do every day.

Some things to think about:
1) Which of the four nibblers are you most prone to? Why?
2) What are your top three time wasters? How could "crunching your container" help address them?

Control the Nibblers: Strategy #15: Apply Selective Perfectionism

The next strategy for controlling the "nibblers" from Julie Morgenstern's book "Never Check E-Mail in the Morning" deals with managing perfectionism - the first of the four "nibblers" in her list. Rather than abandoning perfectionism completely, she suggests a strategy of being more aware when it is needed, and when "good enough" is good enough.

Perfectionists usually find a degree of security or safety in knowing that their work is perfect - they feel that
they cannot be criticised if their work is perfect. They also often have a binary view of their work: it is either perfect or it is a total mess - there is no middle ground. Such a view can be very stressful. As perfection is impossible to attain all the time, perfectionists are often dissatisfied with their performance and drive themselves very hard.

Morgenstern notes that perfectionism has a place: when we deal with students, clients, public statements, products for sale, etc., a high standard of excellence is very important, and creates a very good impression. She argues for "selective perfectionism", where one is driven to perfection only where it is really important, and is prepared to settle for good enough in other areas. She suggests that a version of the Pareto principle (also known as the 80/20 principle) applies here: that 20% of your work needs to be perfect, while the remaining 80% can simply be "good enough". Such a balanced approach is likely to make you even more valuable to your organisation, as you are both productive and producing high-quality work when it counts.

She then provides several tips for managing a perfectionist attitude:

- Ask yourself who the critic is. Who are you trying to impress with your perfect work? For many people it is someone in the past (e.g. a strict parent, or demanding teacher), and for many others the drive for perfection is self-imposed. Ignore these critics! What is more important is what the people who you answer to think about your work.

- Practice doing one thing less than perfectly. Select one task that is not particularly important and give yourself permission to do it less than perfectly. You may find that what you rate as simply "good enough", might be considered "great" by others.

- Back away. One can easily get sucked in by a task or project: spending hours fine-tuning, tweaking, and improving it. If you find yourself in this state, take a break and try to get some perspective. Even better, ask someone else to evaluate it, if possible.

- A deadline is a beautiful thing. Set a self-imposed deadline, if there isn't an "official" one. Remember that "something done imperfectly on time is often better than something done perfectly that's late"! This resonates strongly with me: I'm not sure I would ever have finished my PhD if the university hadn't set a definite, non-negotiable deadline for submission. I really didn't think it was good enough, but it turned out to be quite adequate to satisfy the examiners!

- Delegate the small tasks you obsess over. If you know you are likely to end up spending ages perfecting some task that someone else can do adequately in far less time, then delegate it. (A later competency deals in more detail with delegation).

- Limit the number of revisions you grant yourself. Perfectionists often fall into the trap of making endless revisions (and the ease of revising computer-based documents exacerbates this!). If you suffer from this problem, Morgenstern suggests that you monitor yourself and track how many revisions you typically make to a document. Then, gradually start to reduce the number of revisions that you permit yourself until you reach some reasonable target (perhaps three or four).

- Recognise degrees of excellence. Morgenstern tells a personal anecdote to illustrate this. As a public speaker, she can tell when she hits a perfect ten: her timing is perfect, the audience is hanging on every word she says, etc. Early in her career she would get very despondent if she did not achieve this every time she spoke. However, she was surprised to find that the audience feedback forms showed that they were still very impressed and had gained a lot from her presentations, even when she felt she had missed the mark. A more experienced speaker then gave her some good advice, noting that it is impossible to hit a perfect ten every time you speak. His goal was to reach at least a seven, which the audience would still perceive as an excellent talk. For him (and now for Morgenstern) this was "good enough".

In closing, Morgenstern notes that perfectionists are usually their own worst critics and that it is essential to try to develop a more objective perspective. She returns to her driving analogy, and tells how her father made her walk around the car before her first driving lesson. His point was to make her appreciate the size of the car and how much it projected out in front and behind the driver's position. She suggests that a similar sense of perspective is needed "when your need to polish things to death runs amok"! In the same way that a car is larger than many novice drivers realise, so too people's opinions of the quality of your work is formed by many factors, and usually from many interactions over a long period of time, not just a single task or project. Lastly, she notes that perfectionism can be very daunting for one's colleagues. "Imperfections are endearing -
it makes you more accessible, easier to relate to, and lets other people have a job to do. You really aren't in this alone".

Some things to think about:

1) Where should the line between sloppiness and perfectionism be drawn for the less-important 80% of your work? Which side of the line do you tend to fall on (be honest)?

2) If you have a perfectionist streak, which one of the practical tips above might be helpful in finding a better balance?

**Control the Nibblers: Strategy #16: Replace Black-and-White Thinking with Shades of Gray**

In dealing with the "nibblers" in Julie Morgenstern's book "Never Check E-Mail in the Morning", we come to the area of procrastination. She looks at some of the reasons why we might procrastinate, and provides some techniques to help overcome this tendency.

Morgenstern opens by noting that when we procrastinate our inaction impacts on the people around us. Their work may be held up, and the quality of your own work is likely to suffer as you have to rush to complete jobs by deadlines. She suggests that you keep track of when you procrastinate, and try to detect any patterns. For example, some people might procrastinate on big, daunting tasks, while others put off the small, uninteresting or irritating tasks, and some might procrastinate on everything! Keeping track of the tasks you procrastinate on may also provide some insight into why you procrastinate. Morgenstern lists four common root causes:

- The task is too big. When faced with a large and daunting task, we might not know where to begin - the scale of the job becomes intimidating.
- Performance anxiety - the fear of making a decision. Doing nothing sometimes seems easier or less scary than starting to tackle a difficult task. "You may be worried about making a mistake, or not feel confident in your ability to get the job done".
- Fear of what comes next. Rather than the task itself being daunting, it might be the consequences of finishing it that put us off. For example, completing a performance review for an under-performing worker will mean having to confront them about their poor performance.
- We work better under pressure. Some individuals enjoy the "thrill" of living dangerously by leaving things until the last minute, and the heroic feeling of succeeding under pressure. This technique also helps some people deal with their perfectionism or performance anxiety: the pressure allows them some justification for allowing their standards to slip.

In trying to combat procrastination, Morgenstern advocates a piecemeal approach. Rather than seeing a task as black-and-white or all-or-nothing, try to see it in shades of gray, and tackle it in a more manageable way. She provides several examples of strategies that may help with this:

- Break it down into smaller tasks. This is very similar to David Allen's strategy for dealing with larger projects: identify the next action step and do it, rather than trying to manage the entire task at once. Morgenstern suggests breaking larger tasks into bite-sized chunks that can be done in thirty minutes to an hour. If you're writing a research paper or an important document, just outline it on the first day, then tackle one section a day thereafter until it is done.
- Slip in sideways. Skip the first step and start with the second or third if they seem a bit easier. If writing the introduction to your paper seems too difficult, start with the background, or the method sections, and leave writing the introduction until the end.
- Do a fast and sloppy version. Again, this is useful for documents and reports: just get any thoughts you have down on paper, no matter how random they are and how awful the first draft is. You can revise it later, but getting into the flow of writing and thinking about the subject will help you get going.
- Focus on the payoff. What are the benefits of finishing the task? Will you be eligible for a promotion or a merit award? Will you get to travel to a conference, or impress someone influential in your organisation? Keeping your eye on the potential reward, rather than the drudgery of the task, may help your motivation.
- Remember past victories. Think back on your track record when you successfully tackled similar tasks. Ask
a friend, a colleague or your boss for some encouragement if necessary.

- Set time limits on difficult tasks. You might need to shorten or lengthen the time you allow yourself depending on the situation. If you are faced with a really boring bit of drudgery, set yourself a 30-minute deadline and get as much done as possible. You can come back to it the next day for another short, sharp burst. Alternatively, if you are trying to get something substantial done, but don't have enough time for it, try to set aside a larger chunk of time. You can also try to take advantage of an ability to work under pressure by setting yourself shorter deadlines - if the report is due in a fortnight, force yourself to try to get it finished by the end of the week.

- Choose the best time of day. In competency four (Create the Time to Get Things Done) we considered some techniques for freeing up time when you are at your peak energy for the day. If you are procrastinating on an unpleasant task try to do it during this time (or at least make some progress on it), and view the rest of the day as a reward for this progress.

Morgenstern suggests tackling procrastination that has its roots in fear by focusing on the worst-case scenario: "What's the worst thing that could possibly happen?" Be prepared to laugh at yourself, and analyse whether your fears are realistic.

Lastly, she suggests a simple mind-trick: if you can't get started on a task, give yourself permission to ignore it and do nothing. The spend 15 minutes doing some small aspect of it anyway, since it's no longer important. "Release the pressure"! And don't stress if you don't do anything - set it aside for another day when you feel better about it.

Some things to think about:
1) If you are prone to procrastination, what is the likely cause? What is the impact on your colleagues and/or your organisation?
2) Which one of the techniques above might help you overcome procrastination?

**Control the Nibblers: Strategy #17: Anticipate Surprises**

This week we turn to the third of the four "nibblers" identified in Julie Morgenstern's book "Never Check E-Mail in the Morning": interruptions. In this chapter she provides some very practical ideas for managing interruptions. Some of them require a rather brusque approach to dealing with people, but some could be very helpful.

Morgenstern opens by exploring her driving analogy again. In this case, likening anticipation to the defensive driving technique of expecting the unexpected, for example, not assuming that someone is turning just because their indicators are flashing. She suggests that interruptions can also be dealt with by applying "keen anticipation". She also notes that not all interruptions are equal in urgency - your boss with a request for a report due tomorrow, or a call from a child who has injured themselves at school require more attention than a coworker who wants to discuss a new movie. Starting to manage interruptions probably requires changing some ingrained habits and patterns of work, and like any change this may be difficult and painful. Your colleagues may have become accustomed to interrupting you freely, and, if you have any people-pleasing tendencies, you may quite enjoy this at some level.

As a starting point, Morgenstern suggests that you assess how much time is taken up by interruptions for a week or two. Keep a log in which you note the time, the person, the medium (email, phone, drop in, etc.), the issue, the time taken and the importance. For the importance, she suggests you use a simple A, B, C scale: A is critical and urgent (Covey quadrant 1), B is important, not urgent (Covey quadrant 2) and C is unimportant (quadrants 3 and 4). This data will be helpful in deciding to how to deal with interruptions when they occur.

She then turns to a number of practical strategies for managing interruptions.

- Calculate your daily interruption ratio: use the data you have collected to work out how much of your day is spent reactively dealing with important interruptions (A and B) and how much could be spent proactively tackling your duties. For example, if you spend two hours of an eight-hour workday dealing with category A and B interruptions, your ratio is 6:2.

- Choose two or three key people who can interrupt you at any time: there are a few people (your boss, the
VC, your spouse and children in cases of emergency) who you need to react to when they interrupt. Keep your list to a maximum of five people. You may need to be quite ruthless in keeping some "pushy" people off your list!

- Defer everyone else to a better time: dealing with an interruption later allows you to focus on completing your current task better, and also to prepare and thus deal with the interruption more effectively when you do return to it. Set aside a couple of periods in the day when you will deal with your interrupt queue. Most people will be able to wait, and may even appreciate that you are able to be better-prepared.

- Rehearse a few, comfortable catchphrases: these will help you manage interruptions gracefully. For example, Morgenstern suggests "I'm in the middle of finishing a project, can we talk this afternoon?", "Gosh, I'd love to help you out... but this week is impossible". I've often used "I've got a lecture in half an hour and I'm busy preparing - can I come and find you after the lecture at 11:30?" or some variation on that. Being prepared like this makes it easier to defer an interruption to a later time.

- Create a buffer: use voice mail, or a secretary to screen calls (and encourage callers to leave details of the issue and of when they will be available for you to get back to them), and don't use email alerts. Close your office door and ignore knocks while you work on a task that needs some uninterrupted attention.

- Ask how long it will take: find out from the interrupter how much of your time they require. If you don't have that time available, then schedule a suitable time later. You can also keep people to the time that they declared they needed, which is likely to make them deal with the issue more efficiently.

- Begin the conversation with "What can I do for you?" not "How are you?": the latter is likely to lead to at least some time spent on general "chat", before the issue at hand can be dealt with. The former immediately focusses both parties' attention on what needs to be done.

In a couple of sidebars, Morgenstern deals with some potential pitfalls.

What if it's THEM? People always take more time than they say they will. You will soon get to know if your interrupters underestimate the amount of your time they require (the problem is usually with underestimation - they don't want to be turned away or rescheduled so they claim it will take no time at all). If the interrupter is someone important, you probably just need to accept it. For the rest, Morgenstern suggests calling their bluff. Tell them you can spare twice the time they say they need, but force that deadline. For example, "You only need five minutes? I can actually spare ten, and then I've got a [conference call, meeting appointment, fill in the blank]". You will quickly train people to estimate their time needs accurately!

What if it's YOU? Some people hate saying no! Perhaps from a need to be liked, or a drive to please others, some people really battle to turn others away when interrupted. To counter these kinds of tendencies, Morgenstern recommends taking a bigger view: if you humour an interrupter, you may disappoint someone else when the task you should be working on is delayed or not completed. Who would you rather disappoint: the person in front of you, or the person waiting for your task to be completed?

Some things to think about:

1) What percentage of your day is spent dealing with interruptions? What percentage of these is important (A or B)? (Do the two-week assessment that Morgenstern suggests if you're not sure).

2) Is there one of the techniques above that you could implement easily and comfortably?

Control the Nibblers: Strategy #18: Make Meetings Worth Their While

This week we come to the fourth and final "nibbler" identified in Julie Morgenstern's book "Never Check E-Mail in the Morning", which deal with ineffective meetings. In a university context this is a tricky issue as the relatively "flat", collegial decision-making processes are largely driven by committees and meetings. These differ quite a bit from the more focused, task-driven meetings that are more common in a business setting (which Morgenstern assumes). Nonetheless, some of her techniques and tips are useful in any setting.

Morgenstern opens the section by noting the very real cost of a meeting: people are taken away from their work ("revenue-generating tasks") which has both opportunity costs (the things that don't get done because of the time spent in a meeting) and real costs (the salaries of the people involved in the meeting). To illustrate the real costs, she provides some estimates of the time-cost for various salary levels. For example, if a person is earning R100000 per annum, the cost of a one-hour meeting is approximately R46 (you can multiply this by the relevant factors for your salary and the actual length of a meeting to get your own cost, then add up the
costs for all the participants to get the actual cost for the whole meeting). Given that a meeting incurs these kinds of costs, there should be a benefit to holding and attending the meeting. Morgenstern also acknowledges that meetings do provide valuable face-to-face contact in an era of "impersonal, rushed communication". However, she suggests that meetings should always exhibit the following characteristics:

1) They have a clear purpose.
2) Only the essential people are included.
3) They are as concise as possible.
4) They will benefit from the personal contact (i.e. the matters couldn't have been handled by a circular, 'phone call, email, etc.).
5) They end with a clear plan of action.

Diagnose the Problem

She first lists a number of common problems that may undermine a meeting.

- Inconvenient time. Meetings scheduled for busy times of the day (or the month, or the term) may suffer as a result of the lack of concentration and a lack of preparation by participants who are distracted by the other tasks on their minds. For example, in general, late on a Friday afternoon is not going to be a good time to have a creative, brainstorming session. Conversely, early morning is probably a good time to leave people alone to concentrate on their own work while they are fresh and have their maximum energy. If one must meet late in the day, one should try to keep the meeting "lively", perhaps providing refreshments and ensuring that the discussion is stimulating.

- Too long or too short. Many people in modern workplaces face a lot of "dot tasks" (see the previous chapter), and will start to get anxious if a meeting runs too long, as they anticipate the deluge of email, etc. awaiting them when they get out of the meeting. Morgenstern suggests having more, shorter, well-focused meetings rather than long meetings that attempt to tackle many different issues. However, very short meetings may not provide sufficient time to deal fully with the issues at hand, and end without any real resolution of the issues, leaving participants frustrated at the lack of achievement (and facing the prospect of follow-up meetings to provide a resolution). "An ideal meeting length matches the attention span of participants with the breadth of the topic discussed".

- Unclear agenda. Sticking to the subject is very difficult if the subject is not obvious to everyone in a meeting. Even with a clear agenda, meetings can veer off topic, and care needs to be taken to distinguish between legitimate complementary issues, and red herrings. A further problem arises when participants interject their own hidden agendas or pet issues, whether they are relevant or not.

- Wrong mix of people. If some people have little to contribute they will naturally start to get bored, begin side discussions, fiddle with cell phones, etc. This can rapidly deplete the "energy" of the meeting leaving everyone feeling like they're wasting their time. An even more dangerous aspect of this issue is when individuals or groups disagree strongly with each other on every issue. While they might have valid and potentially helpful views any meeting that involves both parties invariably ends up in an unproductive argument. Ideally, one should not have meetings at which both parties are present - rather meet with them separately. If they must both attend a useful trick is to seat them on the same side of the table, separated by a few other people - the lack of direct eye-contact can help minimise the degree of antagonism.

Meaningful Meetings

Both as the leader of a meeting and as a participant there are various techniques that you can apply to help address the kinds of problems raised in the previous section. Morgenstern breaks this down as a table with a column of tips for leaders and a column of related tips for participants.

Leaders: Question the value of each meeting. Could you use a circular, email, 'phone call, or one-on-one meeting to address the issue(s) just as effectively.

Participants: Ask if you must attend. If you don't see the point of attending a meeting, ask your boss whether you need to go. There may be some reason you don't appreciate for your attendance (perhaps to help act as a buffer if conflict is likely, or because your boss didn't want you to feel left out). If you still don't see any point
Leaders: Question the value and consider the cost of each participant. Bear the real and opportunity costs in mind when including people in a meeting, and make sure that each person is really required. Consider including people only for a portion of a meeting if their input is only required for one aspect of the issue at hand. "If you are respectful of people's time, they are more likely to contribute and feel good about the meeting".

Participants: Can someone go in your place? Is there an assistant or a colleague who can attend on your behalf? For regular meetings, you and a colleague might arrange to alternate attendance with the person who attends filling in the other about any issues that impact them.

Leaders: Question the length of the meeting. Remember that every minute spent in a meeting has costs. Respect people's time and limit the length of meetings.

Participants: Ask if the meetings can be shorter. You could suggest limiting the topics to be covered. Alternatively, you could request that you only attend for the portion of the meeting that concerns you.

Leaders: Control lateness. As a practical idea, people are usually more punctual for meetings that start at "odd" times, such as 11:27, or 15:41! Ask someone else to act as timekeeper: watch the time and ensure the meeting ends at the specified time. Rotating this responsibility helps everyone buy into the concept of running meetings on time.

Participants: Show up on time. Volunteer to be the timekeeper (this may help the meeting leader who doesn't then have to clock-watch, and can also avoid being the person who has to cut others off).

Leaders: Create a clear agenda for each meeting, limited to three items. In Morgenstern's opinion trying to deal with more than three issues almost guarantees time overruns. Be clear about the goals of the meeting (e.g. is it to discuss an issue, or resolve a problem). Be specific. All of this helps keep the meeting on track.

Participants: Ask for the agenda ahead of the meeting. This helps you and the person calling the meeting to focus on the issues.

Leaders: Have meetings standing up. "It's surprising how much gets done".

Participants: Offer to have the meeting in someone else's office. This can help you get out promptly when the meeting is over rather than having to shepherd people out of your office.

Even with these techniques, meetings will sometimes go off the rails. Morgenstern provides some "recovery tricks" to help restore the focus. Again these are tabulated for leaders and participants.

Offense: Rambling off topic.

Leaders: Have someone record side issues, and schedule follow-up meetings to deal with any important ones. This allows for important but not directly relevant issues to be dealt with separately.

Participants: Rehearse recovery lines. Be prepared to help pull the meeting back on topic with some catch phrases. For example, "Is this something we all need to be here for?", "That's an important topic, why don't we schedule a separate meeting on that?", or "Seems like this level of detail should be hammered out one-on-one?".

Offense: Dealing with latecomers and rudeness

Leaders: Start on time - regardless of who's there. Morgenstern also suggests not taking time to bring latecomers "up to speed". People will soon learn to arrive on time!

Ban laptops, PDAs and cell phones during meetings. These tend to waste time as people get distracted and lose focus.

Participants: Be prepared. If meetings seldom start on time, bring something you can work on while you wait, or arrange to spend some time discussing something else with one of the other participants. "Capitalizing on that time, instead of letting it be wasted".

Offense: Lack of decision making by the end of the meeting.

Leaders: Leave a fifteen-minute wrap-up time for every meeting. Note the decisions reached and schedule any necessary follow-up meetings while everyone is still together. Agree on the next actions, with deadlines and who will be responsible for them. If people won't commit to a deadline, at least get them to commit to a definite date by which they will supply the deadline! "Don't yield to the temptation to figure things out later -..."
once the group disperses, all hope of clarity goes with it”.

Participants: Follow up, follow up, follow up. If the leader doesn't end the meeting with clear resolutions, ask for them. If necessary send a follow-up email or make a call to ensure that you are clear on what you are expected to do.

Morgenstern sums up this chapter by noting that managing any of the four "nibblers" requires "awareness, combined with a few well-rehearsed techniques". She also suggests some pragmatism: you're never going to conquer all of these issues completely, so allow yourself and others some space for failure. She also suggests revisiting this chapter for a periodic "refresher course".

Some things to think about:
1) To what extent do Morgenstern's observations about meetings apply to the situations encountered in a university environment? Which of her techniques apply?
2) If you are frustrated by seemingly-pointless meetings, which of her "participant" techniques might you be able to use?

The next chapter by Julie Morgenstern's book "Never Check E-Mail in the Morning" turns to the vitally important area of organisation. As usual, she provides some practical strategies for improving your levels of organisation.

Organize at the Speed of Change

Morgenstern opens the chapter with the story of Mark, a medical supply salesman. As a very successful salesman, Mark found himself promoted to the position of sales manager. However, the "chronic disorganization" that had not been a particular problem before became a major issue now that he had to manage other salespeople. Mark's desk was awash in paper and he found himself battling to field phone calls or prepare for meetings. His lack of organisation was making him look bad to his bosses, and hindering his chances of further promotion.

Morgenstern notes that the modern workplace inundates us all with "information that comes to us in myriad forms - memos, regular mail, e-mail, reading material, computer attachments, handwritten notes, phone messages, business cards”. We need to be able to manage this information and sort that which we need from the dross at high speed in order to cope. She notes that it is ironic that the demands of the modern workplace require that we exhibit high levels of organisation, while providing little, if any, time in which to get organised! Of course, disorganisation in the form of cluttered desks, illogical filing systems, etc. costs us time when we have to hunt for vital information and resources.

Few of us need convincing that more organisation would be a good thing, but how to accomplish this is not obvious when faced with the pressures of getting the job done. Many organisational experts suggest taking a day or two to implement their organisational systems, but few people can afford the down-time required for this kind of major overhaul. For this reason, Morgenstern has tried to develop methods that can be implemented in a few hours. She "will share these techniques with you in this chapter, so that you can find what you need when you need it, feel light on your feet, make a glowing impression on your colleagues and clients, and feel comfortable in your space”.

Strategy #17: Build on What Works

Morgenstern notes that few people are completely disorganised: there are usually a few areas in which we do quite well. For example, Mark, the medical supply sales manager, had his "reference materials" well organised and easily accessible, with things like advertising rates and schedules instantly at hand. This allowed him to perform certain tasks very quickly and efficiently. However, the forms, documents, policies, etc. that related to his management of the sales section were heaped on his desk (not altogether surprisingly, as these represented the new aspects of his increased responsibilities). Arising from this observation, Morgenstern suggests analysing what is and isn't working and focusing first on those aspects that are badly in need of improvement. Don't try to implement some sweeping, global changes to the way you do all your work when some things are already going OK. She also notes that organisation is not about being "tidy" - if you can easily, and efficiently locate things in a messy office, that's OK too - "it's about the effect of the clutter on your productivity".

She narrows down organisational problems to three distinct categories:
- You can't find things. This is a major problem. Your productivity is directly affected by your ability to locate the resources you need. You will waste time while you search for important information, and will be tempted to put off important tasks that require information you cannot locate easily.

- Other people can't find things. You might be able to locate important information easily in the midst of a snow storm of paper in your office, but other might not understand your "system". This might affect others with whom you share resources, but may also affect your own work if you have to ask someone to locate something for you when you're away from your office.

- You're out of storage space. Unneeded information is cluttering up your systems, and wasting space that is needed for relevant information. Just thinking about the problem induces high levels of stress, so we avoid sorting and throwing the junk out.

For each of these three problems, Morgenstern identifies a corresponding solution:

- You can't find things: Redesign or tweak your systems.
- Other people can't find things: Label your existing systems.
- You're out of storage space: Weed out, or add storage.

In order to help identify which are the areas in which you are organised, and which not, Morgenstern suggests considering eight "areas" which most people make use of, and identifying which of the three problems arises. She provides an eight-by-three matrix for this, and suggests you simply tick the boxes corresponding to problem areas. The eight rows/areas are:

1) Desktop
2) Paper filing system
3) Computer filing system
4) E-mail
5) Contacts list (paper or electronic)
6) Briefcase
7) Reference/reading materials
8) Office supplies

Some of the rows may have more than one tick - for example, if you can't find something in your filing system, other people probably won't be able to either! Once you have identified the problem areas, pick the one that is having the greatest impact on your productivity, or the one in which you spend the most time. Tackling this will provide the greatest sense of achievement and relief.

Some things to think about:
1) On a scale of 1 to 10 how would you rate your level of organisation? What one thing might you do to help improve this rating?
2) Do the matrix evaluation exercise suggested above - what is main problem area in your office? Which of the three solutions do you need to implement.

Organize at the Speed of Change: Strategy #20: Create a Road Map for Your Colleagues

The next section of Julie Morgenstern's book "Never Check E-Mail in the Morning", dealing with organisation techniques, considers some of the issues around having a cluttered and disorganised office. She gives a fairly wide-ranging series of tips and techniques for improving several areas of potential chaos.

She starts by dealing with the issue raise in the title above: helping colleagues locate information in your chaos (i.e. tackling the issue we raised last week where other people cannot find information that either they need, or that you need for them to find when away from the office). Some people manage very well with a desk piled high with paper - they have a good memory for what is where and can locate important documents almost instantly in what appears to be total chaos to an onlooker. If this kind of system is working well for you, you
shouldn't have to change it, so Morgenstern provides some tips for guiding you colleagues,

- Label clearly. Use Post-It notes, or sticky labels to indicate clearly (perhaps on the edge of your desk/shelf, or on the top of the pile) what it contains. You can label bookshelves and cabinet drawers in the same sort of way.

- Create a file index. On a single sheet of paper, list each storage area in your office with a brief description of its contents. Give one copy to a secretary or assistant and keep one with you when you travel.

- Use photos. Take a photo of your office, or sketch a plan, and label it with the contents of the different storage areas.

Such an exercise should be fairly quick and easy, but will be well worth the effort if it save you or your colleagues valuable time in locating something urgently. Morgenstern also notes that it is useful to have something like this in place at home too - while one member of the family might have sole responsibility for some duty (e.g. paying bills), it is useful for someone else to be able to locate needed information in an emergency situation.

In a side bar, Morgenstern deals with one objection: what do you do if you have private or confidential documents in your storage systems? The solution is simple: separate these out and store them (and only them) in a locked drawer or cabinet.

Tweak Your Existing Systems

If you need to improve your level of organisation, try to take advantage of what is already working for you. After the workplace assessment exercise last week, you should be able to identify some areas in which you are well-organised. What are the characteristics of these, and what principles can you transfer into other, less well-organised areas? In the same way, you may have had a system that worked in the past, but decided you needed to change it for a new system that doesn't work as well - go back to the old one! Morgenstern gives an example of this: Eloise, an estate agent, had a very good, sophisticated paper-based scheduling system which never let her down. One of her colleagues switched from a similar system to a computer-based system and raved about the advantages, so Eloise switched. She thought she would benefit from the advantages, like the fact that her assistant could update her schedule independently, etc. After a few months of missed appointments and high stress, she was a "nervous wreck" but determined to stick it out with the digital calendar. When Morgenstern asked her what was wrong with the old system, she answered "Nothing". Morgenstern's advice: go back to the old way that works for you!

Know Where to Keep Things

Decide where you will keep major categories of things, and stick to this - there should only be one place to look for something. Morgenstern provides four specific tips in this regard.

1) Anchor your system in paper or computer. Should you print out that document/email and file it, or save it on your computer? Do you copy the information off a new contact's business card onto a Rolodex, or into a contacts database? Which of these approaches you adopt isn't important, but consistency is. You may even decide to have a hybrid approach, where project information, reports, meeting agendas and minutes are stored on paper, but contacts, and financial records and reports are stored electronically (although most people will naturally lean towards one form of storage more than the other). The key is that any item of information should only be in one place.

2) Establish a policy of one-way entry. If you rely on an electronic calendar, but find yourself scribbling appointments on paper when you're away from your computer, copy the appointments into your electronic system as soon as you get back to your computer. Similarly, if you rely on a Rolodex for contacts [does anyone still do that these days?!] copy business cards into your Rolodex as soon as you get back to your desk. While this may seem tedious, you will save yourself time in future when you only have to check in one place for important information.

3) Leave yourself a bread-crumbs trail. If you have to remove a document from a file, mark it and the place you removed it from with matching Post-It notes. Replacing it on your return will be much easier (and thus much more likely!). If other people remove things from your files and sometimes don't replace them, produce some "outguides": sheets of paper with a log on the front with space for a name and a date, and insist that people replace any documents that they remove with an outguide. Then, when you need to find the document, you know who to hunt down!
4) Streamline your briefcase. Carrying around unnecessary stuff everywhere you go is clumsy, inefficient and often embarrassing as you rummage through the mess in front of clients and others. Morgenstern suggests two major categories of stuff: "permanent items" (e.g. a calculator, your business cards, a pen, etc.) and "transient items" (e.g. documents for meetings, reports for reading while in transit, etc.). Use different areas of your briefcase for these two categories of stuff. Never carry anything you don't need. For example, if you're taking a document home, you should have scheduled time that evening to work through it. Give yourself a weight limit and restrict the number of books and files you carry. Clear out stuff you don't need to carry with you regularly.

Some things to think about:

1) Have you ever switched from a system that worked well for you to another that didn't? What kept/keeps you from switching back?!

2) What information do you have duplicated in paper and electronic form? Decide which format you're going to ditch and do it!

Organize at the Speed of Change: Strategy #21: Rearrange Your Desktop

This week Julie Morgenstern deals with a very practical issue in her book "Never Check E-Mail in the Morning", namely managing your desktop (or immediate workspace). She refers back to the story of Mark from the beginning of the chapter, who desk "was a sea of paper".

Morgenstern opens by noting that cluttered desks have a number of very negative impacts on your work: it makes it hard to work efficiently and to concentrate on what needs to be done, and it creates a bad impression for others (colleagues and visitors). "If your [colleagues have] taken to leaving things on your chair so you won't miss them, you know you're in trouble"! Conversely, getting control of your immediate surroundings will often allow you to start to manage other aspects of your office and work better.

Most cluttered desks hold a variety of things that can be loosely classified into three groups: incoming "things to do", material you are working on, or need for current work, and material that needs to be filed or passed on to someone else. This categorisation holds the key to imposing order on the chaos, as Morgenstern advises structuring your workspace into three distinct areas: "In", "Working" and "Out". "These three zones create a tangible, visual depiction of the path projects and to-dos take across your desk". She suggest placing the "In" area near the door, or on a corner of your desk, where it can be easily accessed as work comes in (or is dropped off by an assistant). The "Work" zone should occupy the majority of the space, and be centrally located around your seat. Lastly, the "Out" zone should be opposite the In zone, possibly even on a separate space, rather than your desk. This helps create a clear, visual work-flow.

She then considers to each zone in turn.

- In Zone: This should only contain new materials that you have not read yet. She suggests using a classical inbox, or perhaps a larger box, with subdivisions if there are some common sources of inputs (e.g. a secretary who has two bosses might want to separate out the work they give her). Subdividing your inbox is particularly useful if you have a very large daily volume of incoming work.

- Work Zone: This area should hold everything related to your current work, including reference materials, and "tools" (e.g. phone, computer, pens, etc.), and it should all be within arm's reach. She further distinguishes between "transient" and "permanent" items. The transient items are things that come in and can be processed almost immediately, moving quickly out again (e.g. invoices for payment, or documents for approval). These should usually be kept on top of your desk. Permanent items are needed on a longer term - for example, files of project information, or student supervision files. These should be in a filing drawer (but still close at hand for quick access).

Archival material is defined as material for past projects, etc. that you are unlikely to refer to in future, but do need to keep around (possibly for legal reasons - e.g. old exam scripts). This type of material should preferably be filed elsewhere - not in your office at all. You might want to keep an index or other record of material filed in this way for ease of location if you do need to retrieve something.

- Out Zone: This should contain items that have been dealt with and need to be passed on (e.g.outgoing mail, completed reports, material for delegation). Again, subdividing your "out box" may be useful if there are...
several, common destinations for your outputs. For example, you might have several boxes for people you
meet with regularly so that you can quickly locate the materials you need to discuss with them or pass on to
them.

In wrapping up this section, Morgenstern returns to the story of Mark, the salesman who was battling to cope
with his desktop organisation when he was promoted to sales manager. When they sorted through the piles on
his desk they discover that 10% was "new", 80% was "in process" (mainly notes and reports that he needed to
discuss with his field sales people), and 10% was waiting for filing. They reorganised his desk, using the
principles from above, with one inbox on a corner of his desk where his assistant could place all new items as
they came in. His out zone had two boxes: one for material to be sent on, and one for filing. His assistant was
then responsible for emptying these regularly.

Perhaps the most significant change was in dealing with his "current" stuff. Morgenstern suggested creating a
folder in the filing unit behind his desk for each sales rep. When something came in that Mark needed to pass
on to or discuss with an individual it could simply be dropped directly into the relevant folder. Now, when a
rep came in for a meeting or phoned, Mark could instantly locate the relevant items, "and his desk was clear"!

"In simply rearranging marks desktop, we created a tangible, visible flow to his work that was reassuring to
him. He could think clearly, and he could always get his hands on the information he needed in an instant.
Most important, he had a system that supported him in his new role as a manager - he always felt prepared
when his sales reps called".

Some things to think about:
1) How organised is your desktop? Which of Morgenstern's ideas above might be most useful?
2) Mark's system for dealing with his sales reps could work very well for students you are supervising (I have
used a variation of this system for some time, quite effectively). All it takes is one folder per student in a desk
filing drawer, and all notes of meetings, project details, outlines of write-ups, etc. can be stored there very
conveniently. When a student graduates, I move the contents into a longer-term storage area that is not as
close at hand.

Organize at the Speed of Change: Strategy #22: Weed as You Go

This week we come to the last of the practical tips for organisation from Julie Morgenstern's book "Never
Check E-Mail in the Morning". This one deals with throwing stuff out, something that a lot of people struggle
with.

Morgenstern opens by noting that being surrounded by clutter has negative consequences, "physically,
emotionally, and psychologically, preventing us from making decisions nimbly" (I am reminded of David
Allen's views on the "psychic stress" of disorganisation). Despite our best intentions, most people struggle to
decide what to keep and what to toss on a moment-by-moment basis. Overwhelmed by so much that demands
our decision-making focus, we tend to keep everything, just in case. Morgenstern tells of another of her
clients, Katy, an entertainment agent. Katy has a large office, with an enormous desk, lots of large
bookshelves, a large meeting table, and six storage and filing units. Every part of this office was covered with
"tens of thousands of documents" (before she met with Katy, Morgenstern was told that this would be her
most difficult case ever!) - despite the large meeting area, she couldn't have meetings in her office as the table
and chairs were piled high with paper, and had to move to a conference room. However cluttered her office
was, Katy was not disorganised. She could look at a pile of paper and tell Morgenstern what was in it. Her
system was such that the top part of each pile held the current information, and the rest was "historical" and
could have been thrown out. Katy never found the time to sift through the piles though, so they just kept
growing (her strategy was to clear out when she moved jobs, but she had been in this one for seven years).
While Katy didn't particularly mind the clutter, she was starting to feel oppressed by the ever-growing
mountains of paper. Ultimately, it took the two of them a fortnight to clear out the office together.

As Morgenstern rightly notes, the secret to avoiding this kind of chaos is to "weed constantly", and the key to
doing this is to be prepared - know what you need to keep and what not, so that there is no difficult decision-
making to be done when dealing with a document or file. She provides eight questions to consider:
1) Does it tie in with the core activities of your work?
2) Will it help you complete a current project?
3) Does it relate to a viable opportunity?

4) Will it help you make money? (That's probably not the right question for the non-profit sector - perhaps one should ask if it will help improve the service offered, or boost efficiency/productivity).

5) Do you refer to it on a regular basis?

6) Do you have time to do anything with this information?

7) Would your work be affected if you threw this away?

8) Are there any legal or tax reasons to keep it?

Morgenstern then suggests that you draw up "weed-as-you-go" lists for the various sections of your office, and place the lists on a noticeboard or directly on the wall. Then, if something's on the list, put it in the trash. She provides some examples of such lists.

For Paper:
- Old manuals and reports that have been updated.
- Documents for which someone else has the original (you can always get it back if necessary).
- Printed copies of computer files.
- Duplicate copies of documents (keep the original, safely stored in a plastic sleeve, and one copy - trash the rest).
- Drafts of documents - just keep the final version.
- Unsorted mail over three months old.
- Product brochures (including text book flyers - the info is on a website somewhere).
- Files you inherited from a colleague or the previous occupant of your office (move these into "deep storage").
- Invitations and conference brochures - decide if you want to go, if so, put the details in your calendar, and toss the invite.
- Dated, unread reading material (newspapers over a week old, magazines and journals over three months old, books you've never read).
- Printed copies of websites - keep the URL, toss the paper.

For Computer Files
- Delete (or move to writeable CD/DVD) any files more than two years old that you're not still using.
- Identical files with different names.
- Draft versions of files (just keep the final version).
- Games and programs you never use.
- Photos and music that are filling up your hard-drive (move them to CD/DVD).

For Email
- All junk mail.
- All copies and forwards (let the originator keep a copy).
- Simple niceties and chatty emails.
- Emails setting up meetings and appointments (put the details in your calendar, and press DELETE).
- Early parts of a lengthy thread (just keep the last email with the whole thread - however, make sure you've got it all as some people [e.g. me!] sometimes delete excessive thread history).

For Contact Details/Business Cards
- People who moved long ago, who you have no intention of reconnecting with.
- Business cards from three or more years ago.
- Any name you can't remember.
- Unsolicited business cards pressed on you at some conference or exhibition.
- Business cards, after you've entered the details into an electronic contacts database.
- Phone numbers without an associated name.

For Supplies
- Old letterhead stationery, business cards, etc. that are no longer valid.
- Freebies and promotional items you don't like or want (including all those cheap branded pens that don't work!).
- Old, broken and uncomfortable pens, pencils and office equipment (punches, staplers, etc.).
- Outdated supplies (you're not going to use those OHP pens again!).

More generally, Morgenstern notes that we all feel the need to accumulate information that we think may be valuable to us. The problem is that we often can't locate it when we need it, so we need a good storage and retrieval system. To deal with a large volume of incoming information, she suggests filtering and condensing it wherever possible:

1) Be selective. Have a short list of topics for which you will store information (e.g. your current teaching responsibilities and research field). Within these areas choose your preferred forms of information (e.g. books, journal articles, or websites).

2) Pare it down. Throw away anything that just confirms what you already know, or that you are not likely to use. "Condense, clip, and purge whatever you can before filing".

3) Store it where you can retrieve it. Make sure you can retrieve information efficiently (David Allen has some very good suggestions for this). "Logical retrieval is the first consideration when you're filing your research materials".

What if it's YOU? Morgenstern notes that many of us feel the need to try to keep up with everything that's happening in our areas of interest/responsibility. She suggests adopting the attitude that, while there might be something helpful in that document you're about to throw out, you're a smart person and you'll work it out, or find something equivalent (or even better) when/if you need to. She also notes that a lot of information is actually not that new, but has simply been recycled. "Choose your most reliable source or two, and let the rest go".

What if it's YOU? In another sidebar, Morgenstern deals with the fear some people experience when they worry that they might really need something in the future. She notes that this leads to hoarding and clutter, which usually makes the whole exercise pointless, as you can't then find information when you do need it. She suggests thinking about what you really need to keep, rather than focusing on what you should throw away (a subtle, but helpful change in perspective, which I have found useful). "There's a human limit to how much we can process and retain... Don't save anything unless you have a surefire way of retrieving it. If you have something, and you can't find it when you need to, or you forget that you had it in the first place, you might as well throw it out".

Having focused on the throwing out side, Morgenstern then turns to the question of what should be retained, and suggests having some "auto-save" lists to complement the "weed-as-you-go" lists above. In particular, large projects and conferences can be sources of large volumes of information. Knowing what to keep in these cases can be helpful.

She considers projects first, which might include things outside-funded research, short-courses, etc. She suggests creating an auto-save list at the outset of the project and placing it at the front of the project file. At the end of the project you can go through the file and throw out whatever is not on the autosave list.

Autosave List For Projects
- Original proposal
- Contract documents
- Final project outcomes/reports

Morgenstern – pg.42 of 61
For conferences, seminars and workshops, she suggests spending a little time each evening weeding out what you received that day and dumping the rest in the trash immediately.

**Autosave List For Conferences**
- Business cards for people you really want to stay in touch with (not the pushy guy who forced his card on you in the tea-break after your presentation!).
- Any handouts from sessions where you really learned something new (if you knew it already, trash it!).
- Brochures for products or books that you will really use.

**Hot Tip!** In a sidebar, Morgenstern suggests keeping a file in which you store the "golden nuggets" from conference or seminar sessions. On a single sheet of paper write down a summary of the "tips, facts and information" that are particularly useful or interesting and file it. Not only do you save storage as you can toss all the other information, but you will also retain the useful material much better after having summarised it for yourself.

A closing quote: If the clutter in your office is affecting your productivity because it prevents you from finding things, distracts you, or negatively influences people's perceptions of you, it's time to address the issue.

Some things to think about:
1) Which area of your worklife is most cluttered (paper, computer files, email, etc.)? Draw up your own "weed-as-you-go" list and try using it.
2) How many conference/workshop folders or carry-bags do you have that have never been sorted out after the event? Next time, try Morgenstern's "autosave" suggestions.

**Master Delegation**

The next chapter of "Never Check E-Mail in the Morning" by Julie Morgenstern deals with the subject of delegation - a potentially very useful technique for improving productivity. While much of her focus is on delegation to a subordinate (particularly an assistant of some nature), she does also make the point that one can sometimes delegate work to coworkers, or even to a boss, if the circumstances are right. However, I have summarised this topic quite dramatically, as the very flat structures and relatively independent working conditions that many of us experience probably limit the applicability of this topic.

Morgenstern notes that many of her clients struggle with the issue of delegation: while it can be a very effective technique, it can also consume far more time than it save, if handled badly. She lists three questions that explain the dilemma many people face:
1) Time: while you may not have enough time to do the task yourself, won't take longer to explain it to someone else (and even longer to fix it if they make a mistake)? How do you balance supervision with getting your own work done?
2) Tasks: what should you always do yourself, and what could you consider handing over to someone else? Who is the best person for a specific task?
3) Trust: what if others are less experienced than you (or you have a perfectionist streak, and believe no one else can do a task as well as you)?

Morgenstern aims to overcome these three hurdles in this chapter, and allow you to use delegation effectively and efficiently.
Strategy #23: Break the Habit of Total Self-Reliance

Whether out of habit, or because they don't believe another person can do a task as well as them, many people
don't even stop to think about whether they could delegate some task. Morgenstern tells of a doctor who
always made all his own travel arrangements. While he had several administrative assistants who could have
handled this, he was quite fussy about his preferences and thought it would take too long to explain all these
(and was a little embarrassed by his fussiness). In about 15 minutes Morgenstern had established what his
preferences were, and they were able to pass this responsibility on to the admin team who were then able to
make his travel arrangements or at least provide a short-list of options. This saved him several hours a month.
While he had to admit to some of his idiosyncrasies, his staff still respected him for his ability as a fine doctor.
"Save your time for what you do best, and delegate the rest".

Morgenstern provides a list of suggestions for things you should never delegate:
- tasks that reflect why you were appointed to your current position
- tasks where only you have the necessary expertise to make difficult decisions
- tasks close to the "revenue line" (see Making Work Work 9), which display your "unique talents"
- tasks that you really enjoy and make your job worthwhile

Conversely, you should always delegate:
- tasks that leave you drained when you need to tackle other, more important, tasks
- tasks that you really don't do well
- tasks that are part of someone else's job description
- tasks that you have always done, but are not an efficient use of your time

Strategy #24: Pick the Right Person for the Job

Morgenstern notes that getting this right is the key to saving time: if you pick the wrong person, you will end
up needing more time for supervision and/or correction than if you did the job yourself. She recommends
trying to find a good fit between the task and the skills, experience and motivation of the person being given
the responsibility. She suggests two general categories of task that can usually be delegated successfully: (1)
"noncreative, repetitive tasks", and (2) "special projects, onetime or infrequent tasks". The first category will
usually benefit from an initial investment of your time in documenting a set of procedures to be followed -
these can be refined and handed on to subsequent people taking over responsibility for the job. For the second
category, you need to consider more carefully whether it will take longer to explain the task than simply to do
it yourself (but be honest with yourself!).

Strategy #25: Create a Clear Division of Labour

"Each person should have a clear set of responsibilities that he is fully accountable for. Vagueness creates
overlap between people and prevents them from taking ownership".

Strategy #26: Delegate One Skill Set at a Time

Rather than potentially overwhelming someone with tasks (or many aspects of a complex task) at once, it may
be helpful to delegate one thing at a time. As the person masters one task, their confidence and your trust will
be strengthened, rather than both being crushed by an overly optimistic delegation of too much at once. This
also allows reluctant delegators an opportunity to refine their "style" of delegation, finding out what does and
doesn't work for them. Morgenstern tells the story of one of her clients who immediately delegated small
tasks in all three of the areas in which she needed assistance. Naturally, her assistant was rather overwhelmed
by this. Morgenstern counselled a more gradual approach, starting with a task at which the assistant had some
prior experience, which proved to work really well.

When handing over a task, Morgenstern states that you need to "slow down to the pace of people"! By this
she means that one is often quite hyped up and enthusiastic about a task, and assumes that others are as
engaged and aware. One needs to slow down and explain carefully what is required and what the expected outcomes will be (without being patronising). Furthermore, one needs to be available for subsequent questions and follow-up if the person comes across unexpected issues or problems. Morgenstern discusses four key aspects of delegation:

1) Be clear on the outcome, creative in the path. The final result should always be very clear (i.e. "measurable and specific"), but the person to whom the task is delegated will often benefit from being given some leeway to choose the route to this goal. You might want to give some general direction, and should always specify any hard limits on the possible range of options, but should otherwise allow the person some scope to express themselves and make the task their own (a powerful motivator for many people).

2) Define the due date. There should NEVER be any doubt about this. If necessary, particularly with someone who's abilities you are unsure of, it may be useful to set a deadline that still has a cushion to allow for some revision/correction to take place before your real deadline. It may be useful to provide an estimate of how long you think the job should take the person (but make sure you are realistic).

3) Define limits of authority. "Be clear about where people can make independent decisions and where they can't". They must know in what circumstances they must clear their decisions with you. This is particularly important if you travel or are otherwise out of touch frequently: you don't want to get back in contact only to find that an important task has ground to a halt over a simple decision that could have been made without your intervention. The converse danger, of an inappropriate decision being made without your knowledge, is also obvious.

4) Define follow-up procedures. Be specific about the frequency and format of follow-up. Do you want weekly progress reports by email, daily five-minute verbal updates? Can you be contacted at any time with questions, or would you prefer a written list of questions after a period of time? For long-term projects, you should establish set milestones and ensure that you receive feedback at these points in order to ensure that the project is progressing and is on track.

Strategy #27: Turn It Back Around

If a delegated job is done less than perfectly, you MUST resist the temptation to grab the job back yourself. This is self-defeating for you, and highly demotivating for the other person. Try to work out why the delegation ran into trouble (e.g. were you unclear on outcomes or allowed methods? did the person spend too much time on certain aspects of the task and not enough on others? is the person still learning?). Once you are sure you know the root of the problem sit down with the person, explain what went wrong (being sure to emphasize what was done correctly too), and, in a positive, developmental way, how they could correct this. Then give the task back to them to fix, with an agreed deadline for the revised completion.

Lastly, Morgenstern notes that while the benefits of delegation include some obvious aspects of self-interest (such as the ability to do your own job more efficiently and to focus on your primary interests and responsibilities), "it's also one of the best ways to create a strong sense of camaraderie and respect among employees". To facilitate this, you need to take the time to get to know your colleagues better as people. The improved communication and trust that will spring from better relationships will be well worthwhile.

Some things to think about:

1) Of the three questions (Time, Tasks, and Trust), which do you struggle most with? Which of Morgenstern's strategies in this chapter might help?

2) What regular, repetitive tasks are you doing that you could delegate to someone else? What is stopping you?

Administrative notes:

1) Website for discussion:

   http://csstaffdev.blogspot.com/

2) Archive of past StaffDev issues:
The next chapter of Julie Morgenstern's book "Never Check E-Mail in the Morning" introduces the eighth of the competencies she identifies: the ability to work well with other people.

Work Well with Others

She opens the chapter with the story of Brian, a high level executive in a business consulting company who had had spectacular success in rescuing his section from a disastrous position to producing good profits for the firm. With the division now in a strong and stable position, he was keen to start to focus on developing new avenues and opportunities. However, he found himself bogged down in lengthy, unproductive meetings and having to field questions from his staff, which he felt they should have been able to answer for themselves. He had some excellent people reporting to him, so it wasn't a talent problem. He felt he was a good decision-maker and "excellent with people". As Morgenstern met with his colleagues she was shocked at the very different picture that they saw. Without exception, his immediate subordinates described him as a "nightmare to work with"! They found him inaccessible, a poor time-keeper, and they often had one-on-one meetings with him cancelled. They respected his talents, and they all liked him, but found working for him very difficult. As Brian had mentioned none of these issues, and all his reports were independently very vocal about them Morgenstern had to conclude that Brian was very out of touch with how he worked with others!

She notes that this problem is actually very common. In her experience, about 90% of the people who consult with she believe that they work well with others, while in the majority of cases the opinion of the "others" is very different. In exploring the reasons for this serious disconnect with reality, she notes that most people will be reluctant to tell you that you are difficult to work with."Few people feel comfortable being direct on this topic, for fear of offending, eliciting anger, or destroying a sense of comfort or trust. It's hard to give criticism (and tough to take it) on this issue - maybe because the human desire to be liked is so strong". Furthermore, most of us interpret "working well with others" through our own set of filters: what do we think is important. For example, Brian was proud of his gentle, respectful interaction with his colleagues, based on his own dislike for loud, bullying bosses. While his colleagues appreciated his gentle style, they were more concerned about their inability to contact him when they needed him. His easy-going approach of strolling around the company dropping in on the people he needed to see, and coming back later if they were unavailable, which worked for him, did not suit them at all! "When we view the world through our own filters, it's easy to miss what others are truly requiring from us".

While being liked is nice, and having good, productive working relationships is important, effectiveness is more important than likeability. She points out that one can usually think of a counter-example: someone you really don't like (e.g. you would never want to socialise with them), but at work you can cooperate fruitfully and respectfully "because of their talent, skill, and reliability". In her opinion, the important issues are being able to work together productively and efficiently in a "pleasant, cooperative, energetic environment". Working well in this way usually helps with workplace relationships too, as there will be reduced frustration and better communication.

With that as background for the chapter, Morgenstern then turns to some specific strategies for working well with other people.

Strategy #28: Avoid the Six Gripe
categories:

1) Inaccessibility: people are not available when needed to respond to queries, or are slow to respond with guidance or authorisation.

2) Unreliability: people don't keep commitments (either for deliverables, or for meetings).

3) Rigidity: people refuse to change, and won't accommodate the needs of others.

4) Disrespectfulness: people can be "insulting, patronizing, condescending, and rude". They may also show little respect for other's time, space or possessions.

5) Vagueness: some people do not communicate clearly, leaving others confused. Communication might be ambiguous, or completely non-existent. Some people change their minds frequently.

6) Unfairness: some people "take more than they give" causing resentment.

While these categories are simple, Morgenstern has found them to be accurate. Turning each of them around gives the list of six characteristics of people who do work well with others:

1) Accessible: they are "available, approachable, and ... get back to you within a reasonable amount of time".

2) Reliable: they deliver what they say they will, when they say they will, and if they can't, they tell you.

3) Adaptable: they demonstrate flexibility and creativity, with a "can-do" attitude.

4) Respectful: they respect your contribution, don't waste your time, and respect your boundaries.

5) Clear: they specify what needs to be done, and how work will be evaluated directly and unambiguously.

6) Fair: they are reasonable, look for mutually beneficial solutions to problems, and are appreciative of your hard work.

Morgenstern suggests thinking of one or two people who you have found very difficult to work with and trying to identify which of these six characteristics they do not display, and conversely one or two people who you have enjoyed working with and which of the characteristics they do embody.

She then suggests grading yourself: be completely honest with yourself and award a mark (A - excellent to F - failing) for the six characteristics. Think about situations in your workday and how you have handled your interaction with others, and how they may have perceived this interaction. What behaviours have other people praised you for, or (perhaps subtly) shown signs of frustration with. Do you delay responding to emails? Do others often misunderstand you? She notes that nobody is perfect, and you shouldn't expect yourself to be. In analysing your grades, are any of them unexpected? Where do you do well, and where do you need improvement? If you battled to grade yourself, did your answers tend to depend on the situation, or the person you were dealing with?
Some things to think about:

1) Who have you enjoyed working with (or not)? Which of the six characteristics do they display (or not)?

2) How do you rate yourself on these six factors? What could you do to improve your weak areas?

Administrative notes:

1) Website for discussion:

   http://csstaffdev.blogspot.com/

2) Archive of past StaffDev issues:

This week Julie Morgenstern book continues with the eight competency (concerning working well with others) from her book "Never Check E-Mail in the Morning". Last week we met the six traits that tend to underlie any interpersonal tension in the workplace, and the next strategy discusses how to compensate for personality clashes.

A quick reminder: the six negative characteristics are:

1) Inaccessibility
2) Unreliability
3) Rigidity
4) Disrespectfulness
5) Vagueness
6) Unfairness

For each of these there was also a corresponding positive characteristic: accessibility, etc.

Work Well with Others: Strategy #29: Watch Out for Your Relationship Traps

Morgenstern opens this section by noting that most people are not deliberately or knowingly awkward and difficult to get along with in the workplace. Rather, such problems usually arise because of "work style, communication style, insecurity, unconscious power struggles, and even pragmatics". The example of Brian last week underscores this, as he was completely unaware that his coworkers were highly frustrated by his inaccessibility, while genuinely liking him as a warm and friendly person.

The point of this strategy is to try to identify your own quirks, and how these might impact on others around you, or interact in particular ways with the traits of other people. If you know where your personal weaknesses lie, you are in a better position to manage them productively. Morgenstern comments that some people will always be "triggered" by a specific characteristic. Conversely, "There are some things we are
better equipped to handle than others". Which of the six potentially problematic characteristics above are most likely to evoke a strong reaction from you?

Balance of Power

Morgenstern notes that another important factor in how we react to the six personal traits is the nature of our relationship with the other person. We may accept behaviours from our bosses that would cause us to explode at someone lower than us in the workplace hierarchy. Or, we might be very understanding and forgiving with people "below" us, but get incredibly frustrated with those higher up, who should know better. Whatever, the specifics we are likely to react differently depending on the relative power relationships. Sometimes these reactions trace back to past experiences - perhaps in childhood, at school, or in a previous job. Where do you experience the most negative interactions? Is it with your boss, with someone who reports to you, with your coworkers at the same level as you in the organisation? Do you have a problem with everyone in that position, or just a few individuals?

Morgenstern returns to the story of Brian, the high-level business consultant. When he did the grading exercise we looked at last week, he needed to do it twice: once for his boss and the directors (where he received consistently high marks: As and Bs), and once for his staff (where his marks were pretty bad: Cs, Ds, and Fs). They traced this to his feelings of insecurity after his promotion: he reacted better to authority than to behaving with authority. She then tells the story of Sheila, who had completely the opposite reaction. She worked incredibly well with the people around here, getting all As on the assessment, but she was intimidated by her bosses and scored very badly in terms of her interactions with them. The solution in her case, was to be mindful of the six characteristics and to work to ensure that her bosses perceived her well in these six areas.

The last point brings us to the key for dealing with interpersonal issues: you need to change your behaviour - "it's all about changing what you can control - and that is you". If someone grates you badly in the workplace, analyse what they are doing that you dislike (in terms of the six traits), and which of the traits you are displaying in response to this. For example, if someone is unreliable, your response may be to become inflexible in an attempt to control their reliability. Or, if a boss is unfair, you might respond by being vague to prevent being put on the spot, or judged. Morgenstern suggests that you don't get too hung up on trying to analyse the other person's failings - as we already noted, they may well be unconscious, and no one is perfect. However, you can and should try to change your reactions, which will usually have an impact on the relationship. "In any difficult situation, instead of reacting by feeling victimized, take responsibility for solving the problem. Get your ego out of the way and focus on the common goal - getting the work done".

In the case of a boss like Brian, who is inaccessible, you need to increase your flexibility and accessibility. Ask him or her how best you can communicate with them in order to get your questions answered - can you email questions, should you phone his/her cell phone, ask their secretary to schedule a formal meeting?

Morgenstern suggests using the six "gripes" as an analysis tool whenever you are experiencing negative interactions in the workplace. Your self-awareness of your own quirks will help you manage your relationships much more productively.

Some things to think about:

1) How does the "balance of power" affect your score on the six-trait grading exercise from last week?
2) Which of the six negative characteristics is most likely to evoke a strong reaction from you? Why do you think this might be?

3) Can you think of a difficult relationship where you might be able to react differently in order to improve matters? Which of the six positive traits do you need to work on in this case?

Administrative notes:

1) Website for discussion:
   http://csstaffdev.blogspot.com/

2) Archive of past StaffDev issues:

In the next section of "Never Check E-Mail in the Morning" by Julie Morgenstern, she covers the six workplace relationship traits, and looks at what may contribute to problems in each of these area, as well as some practical tips for improving your performance in each of them.

Work Well with Others: Strategy #30: Improve Your "Works Well" Grades

She opens by noting that the practical ideas she presents in this section can help you in relating to your boss, coworkers, people who report to you, customers (students), etc., etc. For each trait she presents some factors that may contribute to your scoring badly in that area (often identifying behaviours that we may not even be conscious of). Understanding these issues may also make you more sympathetic to the grating characteristics of others you work with. She then presents "tips and strategies to change your behavior and improve your relationships".

1. Be More Accessible

Problems in this area might be caused by:
- Pragmatism. Your travel schedule or working hours may make it difficult for you to be accessible. You might always be rushing without having the time to stop and discuss some issue. Practically, you probably cannot be as accessible to everyone as they would ideally like.
- Work style. Some people get so focused on their work that they zone everything else out, and get very irritable if they're interrupted (Morgenstern herself works in this way when she's writing).
- Insecurity. Some people may avoid facing issues that they're uncomfortable, or feel unprepared to deal with. Ignoring "difficult" tasks and avoiding the people associated with them becomes a survival strategy.

Tips for increasing your accessibility:
- Give yourself a 24-hour response policy. When people need information or action from you, make sure you respond within 24 hours so that they can make some progress themselves, or at least work around your schedule.
- Establish daily "huddles" or weekly meetings with key people. Having a regularly scheduled meeting with
your colleagues helps to establish a routine when they can guarantee they will have access to you. Try to get agenda points from them ahead of time so you can prepare. For people who don't need as much access you might want to schedule a lunch meeting once a month/term/semester, as appropriate.
- Let people know the most efficient way to contact you. Particularly if you travel a lot and may be in different time zones, it can help others to know how you prefer being contacted (email, phone call, etc.).
- Create open-door times. If you're often head-down behind a closed door, ignoring interruptions, schedule and publish some times when you will be available. If necessary, get an assistant to book appointments for these times in 10- or 15-minute slots.

2. Be More Reliable

Possible problems:
- Difficulty saying no. While people are motivated by good intentions, agreeing to every request is probably not realistic, and is likely to cause considerable unhappiness as tasks get neglected due to over-commitment. "[D]elivering good results far outweighs having good intentions".
- Poor time-estimating skills. Some people underestimate the time required for tasks, and thus end up over-committed. Another symptom of this is when someone tries to do "just one more thing" before the start of a meeting or appointment, and ends up running late for the meeting/appointment.
- Power struggle. Some people ignore deadlines as way of asserting themselves or because of an inflated view of their position, importance, etc. Refusing to follow the lead of others is often just an exercise of ego.
- Insecurity. Again, insecurity can lead to unreliability as people delay starting a task they are uncomfortable with and hence end up not delivering on time.

Tips for increasing your reliability:
- Watch what you promise (don't make empty promises). Ensure that you answer three important questions before agreeing to take on a new task: how much time does the task require? When will you do it? What other tasks might you need to discard in order to take the new one on? If this is an issue for you, pick one person with whom you will strive to become more reliable and see what impact this has on your working relationship.
- Resist temptation. You will be late if you try to get "just one more task" finished before turning your attention to something else.
- Get better at saying no. This can work very well, even with your boss, if you make the trade-offs clear and get their guidance on the relative priorities.
- Create the conditions that bring out your best performance/maximum energy. Everyone works optimally under different circumstances. For example, if you need eight hours sleep in order to work well, make sure you get it! If missing breakfast leaves you lethargic and irritable, make sure you eat something (even if it's just an energy bar on the way to work). If you're stressed, do what it takes to get your equilibrium back (perhaps exercise, or calming music, or using a stress ball).

3. Be More Adaptable

Sometimes inflexibility is important (for example, following health and safety guidelines), but if it is impacting negatively on your colleagues you need to develop some adaptability.

Possible problems:
- Performance anxiety. Some people try to control their circumstances in order to work at their best - they're "scared to change". Sometimes, there is also a "lack of imagination" - having done a task in the same way for years, people cannot see that there might be a better way. Do people work around you because of your reluctance to change?
- Power struggle. Again, people may resist change as a form of rebellion against authority, or as a way of
asserting themselves. If you get a sense of power when you force people to do things your way, you may have what Morgenstern aptly describes as a "diva mentality".

Tips for becoming more adaptable:
- Change "but" to "and". When you're tempted to respond to a request with "but...", try wording it as "and..." - you will come across more positively, and will tend to focus on solutions rather than problems. For example, if someone insists on reducing a budget, you might be tempted to say "But that will impact on quality". Rather try something like, "Sure, and since that will impact quality, where would you prefer us to shave the costs?".
- Experiment with a new way of doing things. Getting out of your old routine and breaking old habits may stimulate your creativity in surprising ways. For example, staff meetings might always have been held at the same time - try adjusting the time or day of the meeting.
- Adopt a give-and-take attitude. Being flexible with others is likely to result in them granting you some leeway when you might need it.

4. Be More Respectful

Most people want to feel respected and will be be very negatively impacted by actions perceived as disrespectful. Disrespect may be unintentional, but beware of acting in a demoralising or patronising way.

Possible problems:
- Work style. You might be impulsive and burst into peoples' offices when you've had an inspiration, or you may be used to doing work yourself, which could come across as dismissive of the potential contributions of others. Some people may be critical of others who don't work the same long hours (or even work to the same schedule).
- Communication style. You might launch immediately into your story when you phone someone because you don't want to waste any time (theirs and yours), but this might be perceived as rude. Conversely, your efforts to break the ice and lead up gently to the point of your call/visit might not be appreciated by someone in a hurry.
- Power struggle. Again, your ego may cause you to be dismissive of others' ideas and contributions. Be sure to acknowledge the help of others. Micromanaging someone's work can also be a symptom of needing to feel that you're in charge.

Tips for becoming more respectful:
- Find something to truly admire about everyone you work with. As Morgenstern notes, this might be difficult sometimes, but it is almost always possible. Morgenstern tells the story of Josh who was a complete pain to work with. However, he was very passionate about his job and worked hard at it. Focusing on that enabled his colleagues to tolerate his annoying mannerisms. "Try to remember that people want to do well and that everyone likes to make a contribution".
- Use old-fashioned manners. Ask people if they have a moment to talk before barging into their office or launching into your story on the phone. Don't check your voice mail or text messages while you're talking to someone, or read your email while speaking to someone on the phone. Don't ignore people or their contributions. Be punctual, and don't overrun meetings.
- Let people do their jobs. Avoid micromanaging (and thus being perceived as distrustful).
- Limit the chitchat. Keep conversations on topic and minimise inappropriate personal stories.
- Focus less on people's hours and more on what they produce. If someone can get their job done in less time than you, try to find the secret of their productivity rather than criticising their "lack of commitment".

5. Be More Clear

Morgenstern – pg.52 of 61
Clarity and precision almost always lead to efficiency and productivity, but communication is not always simple and messages do get misinterpreted.

Possible problems:
- Work style. Creative people might prefer some ambiguity as a way of allowing solutions to develop organically, or may battle to express their inner vision for some goal. More logical colleagues may be driven crazy by this kind of approach and want to know exactly what the goal is and what the plan is to get there.
- Communication style. Do people frequently misinterpret what you ask them to do? If so you may be a lot less clear than you think. Some people will fire off a list of instructions, which they think were precise, but which overwhelm the person they're talking to. Some aspects of a task might be more interesting to you than others causing you to gloss over the boring bits. Or you might be a "big picture" person, who doesn't want to get bogged down in the details, which other people might really need to know.
- Authority issues. Fear of disappointing a boss or a customer may lead to you watering down your comments rather than speaking frankly. Similarly, a desire to be polite and respectful may lead to communication that is not adequately direct.

Tips for becoming more clear:
- When explaining something, ask the other person to repeat or summarise their understanding of your request. This allows you to detect misunderstandings and rectify them before it's too late. Writing down what you want to say beforehand may also help you clarify your thoughts and thus your communication.
- Explain your communication style. If you have an unstructured, creative approach explain this to others and point out that you appreciate all ideas and input, even those you reject, as they all help contribute to the development of the final concept.
- Be honest. Be prepared to admit what you do not know about a situation. People will appreciate your honesty. Similarly, let people know when a task is falling behind schedule, and ask for help if necessary. The truth is likely to be far better appreciated than finding out that an important project won't be finished on time when it's too late to do anything about it.
- Know your audience. If you're talking to someone who is a "big picture" person, don't bore them with detail. Conversely, don't overwhelm a detail-oriented person with too much information at once.

6. Be More Fair

In Morgenstern's opinion, fairness probably ranks immediately after respect for most people. However, she also notes that fairness is often difficult to define: the workplace seldom allows a direct tit-for-tat exchange of effort and energy. She notes that fairness in the workplace often involves "an exchange of services for time" - you help someone out, in the expectation that they will help you out when you need it.

Possible problems:
- Misassumptions. You may think you are doing someone a favour by bringing them into a major project with opportunities for personal development, but they might want to get home at 5:00pm every day to spend time with their family and thus do not appreciate the extra demands. You might also underestimate how much effort a task will take for someone else. You could have done it easily but it's a huge extra load for them, possibly with little direct reward.
- Sense of entitlement power struggle. Some people believe they deserve things (bonuses, promotions, fancy titles, special privileges) despite the usual norms that apply to these rewards. If you're always arguing for special treatment, and seldom being granted it, it is possibly because this would be unfair.

Tips for becoming more fair:
- Remember that work is an even exchange. Make sure you understand what other people are getting out of a task - if in doubt ask them! Morgenstern tells the story of someone who took a pay-cut to join a non-profit organisation whose mission she cared about. Realising this, her boss found opportunities to expose her to strategic meetings and other things that helped bolster her sense of contributing to something really important.

- Look for the win-win. When asking someone for an extra effort, try to find a solution that benefits everyone involved.

- Recognise when you are asking people to go above and beyond. Sometimes you need to ask for a special favour, or an extra effort. However, you should be careful not abuse people's willingness to help out, and should be very diligent about acknowledging their contribution and willingness.

In closing, Morgenstern notes that sometimes you might be the cause of an awkward workplace relationship, and sometimes it will be the other person. However, no matter who is responsible for the problems, you should be prepared to take the responsibility for trying to manage the relationship productively. "The better you are at the competency of working well with others, the happier and more valued a worker you will become".

Some things to think about:

1) Which of these issues might be a problem for you? How can you start to address this, possibly by using one of Morgenstern's tips above?

2) Which of these issues might be a problem for a colleague? Why do you think this is? How could you compensate for the problem?

**Leverage Your Value**

The next chapter of "Never Check E-Mail in the Morning" by Julie Morgenstern is the final chapter. In it she sums up much of the previous material, and provides some final strategies for applying her principles in your workplace. However, the first few sections deal with some of the "It's Them" issues that you might encounter. Morgenstern opens this chapter by summing up what we have learned up to this point. She notes that you should be comfortable with the eight competencies:

1) Embrace Your Work/Life Balance
2) Develop an Entrepreneurial Mindset
3) Choose the Most Important Tasks
4) Create the Time to Get Things Done
5) Control the Nibblers
6) Organise at the Speed of Change
7) Master Delegation
8) Work Well with Others

She then repeats the self-assessment questionnaire she presented at the beginning. Rate yourself from 1 (never true) to 5 (always true) on the following questions. Don't think about the answers too long - just note down your initial response.

1) When overloaded are you easily able to prioritize and focus in on the most critical tasks?
2) Do you turn work around quickly, rather than letting it get baked up on your desk?
3) Do you have a good way of tracking your to-do list?
4) Do you have a general structure to your day or week that enables you to feel in control of when you do things?

5) Are you physically organized, keeping papers, computer documents, contact information, and work materials in order and at your fingertips?

6) Do you have productive, efficient working relationships with your coworkers, assistant, direct reports, boss?

7) Are you generally pleased with your work/life balance?

8) Can you clearly identify the core responsibilities of your job?

9) Do you feel secure in your ability to performing each area of your key responsibilities?

10) Can you easily let go of low-priority items, without guilt?

11) Do you understand and believe in the mission of your organisation?

12) Do you know what your most valuable contribution is? What makes you unique?

13) Is your most valuable contribution what your employer wants?

14) Do you keep yourself current in the expertise required by your job?

Scoring: Add up your points (1-5) for each question to get a total out of 70, and rate yourself on the following scale:

- 14-20: Drowning
- 31-50: Treading water
- 51-70: Swimming along

More importantly, you should compare your score now with that from the beginning of the series. If you've been applying her strategies, you should find you are doing better now than then. "Where have you improved? Where do you still need work? ... What competency, for you, is the most critical to remember? Have you learned anything about yourself that surprised you?". While your score might not be perfect, you can still feel good about any improvement, and use this as an encouragement to develop further. Think about the small changes you have implemented and the results you have experienced from them.

She notes that the focus up until now has been very much on "fixing yourself". However, there are four distinct issues where "it's them" is the right answer, because somebody else is in control in these areas. These four issues are:

1) Workload
2) Company culture
3) Company changes
4) Compensation

While these are definitely "them" issues, you can still apply the other competencies to help you face and deal with these issues. Specifically, you can point to your improved levels of productivity if you decide to try to tackle these organisational issues.

Issue 1: Workload
"Most people crave work that is interesting, challenging, and meaningful, spanning a variety of tasks, with clear priorities and a manageable workload". However, you might find yourself forced to do work you really don't enjoy or that doesn't make use of your strengths, or you are completely overloaded, no matter how efficiently you work. Being permanently snowed-under or stagnating in boring tasks can be very demoralising and draining.

Morgenstern describes the situation one of her clients, Alex, found himself in. Alex worked for a drug company and had been promoted to a senior executive position, which required relocating across country to the firm's headquarters. On taking up his new position, he found himself completely snowed-under - buried in meetings, and demands from his staff, while being pressured by his boss to deliver. As hard as he tried he
couldn't get on top of his workload, and was starting to wonder if he was incompetent and should never have taken the promotion. In desperation he called on Morgenstern for help. As he described his predicament, Morgenstern thought he was genuinely overworked. However, he still insisted on putting her techniques for managing his workload into practice. His efficiency improved, but he still couldn't cope. Over a period of time, they tracked his daily workload, and generated the hard data to demonstrate that he was overloaded. "This guy was a model of efficiency, never wasting one second of the day". Together, he and Morgenstern estimated that that were an additional 60 hours of productive (one- or two-steps from the revenue line) tasks that he just could not get done. Alex then took this data to his boss, and argued for two more people to be hired to help him: one new executive position and one "high-level administrator". With the data he had, he could demonstrate that these people would easily earn the company far more than the cost of their salaries. "Six months later, with the two new [people] in place, Alex began to enjoy his work again. He was working hard, but relishing the joy of completion - feeling confident and back in control again".

If you are feeling overloaded or bored, Morgenstern suggests applying the following ideas:
- Keep a results-oriented daily log. Track what you get done each day, focusing on actual results. She notes that this will also have the side-effect of encouraging you to complete tasks (as discussed in competencies four and five). A log like this will help you in justifying your predicament to your boss and motivating for a reassignment of workload or the hire of an assistant, etc., as it did for Alex. It may also be useful data if you are subject to annual performance reviews, or wish to motivate for a promotion or an increase or merit award.
- Ask for more challenging work. If you are handling your current workload well, but find it boring or unsatisfying, you can ask for different tasks to be assigned to you. This needs to be handled carefully when you approach your boss, and you may need to continue with some of your current tasks until you have demonstrated that you can manage the demands of the new assignments you have requested. You may also need to demonstrate the benefits to the organisation of reassigning duties in the way you suggest.

Morgenstern notes that almost all jobs have some aspects that we will never enjoy. We need to do these well, and keep alert for opportunities to exchange them for other tasks we would prefer.

Some things to think about:
1) How did you do in the second self-assessment? Where have you improved? Where do you still need work?
2) What aspects of your job are boring? Is there some creative way in which you might be able to motivate for a reassignment of duties?

"It's Them" Issue 2: Company Culture

The next section of the final chapter of Julie Morgenstern's book "Never Check E-Mail in the Morning" continues the focus on the "It's Them" issues. This one deals with company culture - a very topical issue.

Morgenstern defines company culture as "a mood, a tone, a style of interacting, or a way of doing business that permeates the entire company". She notes that it usually begins with the culture embodied by the top leaders of the company and then works its way down through the company through the interactions by the employees. For example, there may be a very formal, or a very casual approach; some organisations may value working as teams, while others are more competitive and reward individual performance; some are empowering and trust-based while others micro-manage employees' activities. Ideally, your own personality will mesh well with the culture of the organisation for which you work. However, this is not always the case.

Sometimes, a culture-clash is quite subtle and one doesn't realise that there is a very different outlook underlying tensions. This can cause self-doubt ("is there something wrong with me?"), or you may feel like the proverbial square peg in a round hole. In such situations, it can be very difficult to adapt to the company culture (at least without "abandoning your ideals, values, and ethics").

Morgenstern gives the example of Brenda, a financial adviser at a leading Wall Street firm. Brenda was the opposite of most of her colleagues: caring and ethical, she focused on building strong, long-term relationships with her clients, while the others were pushy and focused on their short-term, performance-linked bonuses. This difference in fundamental approaches caused considerable conflict. Brenda's dilemma was trying to maintain her principled approach to dealing with clients while meeting the same targets as her colleagues. She even considered resigning and starting her own company, which she could run on her own principles.

However, when she considered the difficulties inherent in starting her own company, and the levels of support
and the opportunities that were available in a large, multinational company, it made a lot of sense to stay where she was. So, she chose to stay, but worked to find a balance between her principled, slower approach to bringing in clients and meeting the requirements of her job. While this wasn't easy, she was able to delegate some work to her assistant who managed smaller deals, on a shorter time-frame while Brenda focused on building the long-term relationships that brought in big deals. In time, she eventually rose through the ranks as her unique contributions were recognised. "It took patience, diligence, and a constant inward focus to remember who she was, trust her won values, and work within the culture. Working around the culture without sacrificing her values, Brenda maintained her integrity, and even found a few others in the company who appreciated her style".

Morgenstern then gives some practical tips on how to manage a clash of cultures, such as the one Brenda experienced:

- Earn respect and build credibility. Getting on with your job quietly, while avoiding the aspects of the organisational culture with which you disagree won't make you the life and soul of the office party, but it will earn you respect and credibility for your work. "You can be a team player and collaborative partner without sacrificing your core beliefs".
- Find an advocate/buddy. No matter how isolated you feel, you should be able to find someone (e.g. a boss, a colleague, or even an assistant) who appreciates you for your contribution and will encourage you to remain true to yourself. Importantly, you should not let your relationship with your advocate/buddy devolve into a continual whinge session about how awful the organisational culture is - rather focus on how you can adapt and work productively within the system.
- Focus on the positive. Even in the most extreme clash of cultures, there should be some aspects of the organisation that provide some value, even if it is just the learning experience of coping with the situation. In Brenda's case, she realised that the company offered her great opportunities and resources - far more than she could have mustered if she started her own company. For her, this was important, and outweighed the problems she experienced. Concentrate on the benefits and opportunities that your current position offers.

Some things to think about:
1) What is the prevailing company culture in your workplace? How well does this fit with your own values
2) If you're experiencing a culture-clash, which of Morgenstern's three tips might you be able to use to help address this?

"It's Them" Issue 3: Company Changes

As we near the end of Julie Morgenstern's book "Never Check E-Mail in the Morning", we come to the next of the "It's Them" issues: change. The over-used cliche that change is the only constant in the modern world is a fact of life in many areas. Morgenstern tackles this issue, with a powerful example from the field of education.

In business the pace of change seems to keep accelerating, and even in the relatively protected world of academia there have been sweeping changes in recent years with the introduction of new policies, approaches and systems. As Morgenstern notes, "change is unsettling", whether or not one was enjoying the old situation. Change can cause a lack of confidence, comforting, familiar routines are shattered, and enforced new ways of working may destroy a sense of freedom and autonomy. While some people resist change as a matter of course, even the most flexible and adaptable people may sometimes feel that change is for the worse. Reactions may vary from flight (resign!) to fight (passively or actively working against the change). In practice, a process of adaptation is often (not always) the best course of action.

To illustrate this, Morgenstern tells the story of Lilly - a "creative, dynamic, and smart" school teacher with 25 years experience. Much to her dismay, the local school system was radically changed. Rapidly, Lilly went from a happy, productive teacher to a depressed, angry individual. She described the new scenario as "horrible", and new teaching methods and curricula were mandated by the new administration. Lilly was furious at the lack of "classroom freedom and creative expression" that had been one of the main strengths of her teaching for decades - the new approaches directly contradicted her personal teaching philosophy. She reacted by making very little effort to master the new approaches, and insisted on using her traditional methods, even when being observed by school inspectors. Lilly was open about her disapproval of the

Morgenstern – pg.57 of 61
changes, speaking up at staff meetings and confiding in the principal. Much to her surprise, the other teachers were relatively quiet and did not support her attempts to challenge the new situation. The whole atmosphere appeared to Lilly to have changed from an "open environment, where different opinions and debate were welcomed" to one of suspicion and fear. Even more devastating was her end of year performance assessment where the principal who she had trusted and confided in, put her on probation for "failure to conform". Despite all of these setbacks and problems, she still wouldn't consider leaving the school, partly because of her dedication to teaching her students, and partly due to the fact that she was nearing retirement, and would face serious financial consequences if she took early retirement. She worked with the teachers' union to challenge her probation, and avoided the principal who she felt had betrayed her as much as possible. The strain weighed heavily on her health and she had to take antidepressants and "anxiety medication". At this stage, she started to evaluate the impact that her struggle was having on her health and her happiness. Fighting the system was clearly not working.

After a fortnight of careful reflection, Lilly realised that the principal was not the problem - she was simply implementing the measures required by the local school administration. While the principal might have done a better job of enabling the teachers to adapt, Lilly recognised that she would have to "adapt or die". "Lilly took it upon herself to study and master the new curriculum, determined to excel at its delivery, whether she agreed with it or not". Her victim-mentality and anger at the changes had undermined her "sense of control". Once she adopted a more positive attitude, her relationships with her fellow teachers improved almost immediately as they started to work together again for the common good of the school and the students. Morgenstern notes two powerful lessons for dealing with change that come through in Lilly's story:

- Don't look to the past in times of change. Dwelling on the "good old days" in a time of change is really not helpful. "You become the anchor, the weight, holding everyone, including yourself, down". Morgenstern suggests forging ahead with the new situation, and deliberately not comparing it with previous circumstances. "Be willing to look forward and embrace new ideas".

- Be the host, not the guest. As far as possible, try to help others around you to adapt to the changes. This helps avoid falling into thinking like a victim, and helps you retain a sense of control. Change may well provide new opportunities for self-development, or learning new skills. You will grow as an individual, and in your value to your employer.

A closing thought: there are times when one needs to take a principled stand against attempts to introduce change that is unprincipled, or destructive. However, these kinds of watershed moments are probably very rare, and one should be very wary of dismissing any new initiative without very careful consideration. Some things to think about:

1) Have you ever experienced drastic change (either in your working situation, or in another setting)? How did you react?

2) How willingly do you "look forward and embrace new ideas"? Thinking of a change you have experienced, how could you have adapted better and/or more quickly?

"It's Them" Issue 4: Compensation

The next section of Julie Morgenstern's book "Never Check E-Mail in the Morning" deals with the fourth (and last) of the "It's Them" issues, namely compensation. Given the relatively inflexible remuneration policies of the University, I wasn't sure whether I should summarise this one, but I think it has some value, especially if one takes a broader view of "compensation" (and the University has shown some flexibility in this regard, for example, accommodating special deals like part-time working arrangements).

Morgenstern opens by noting that compensation does include more than just one's salary - factors such as "time off, benefits, bonuses [merit awards], gifts, opportunities, or status" all contribute to the value that an organisation demonstrates towards its employees. In seeking to improve one's compensation deal, Morgenstern notes that improving one's "productivity and performance" are keys to negotiating a better package. She notes that one needs to assess any such improvement against the starting point: if one was performing very badly, an improvement may simply have brought one up to the level where one deserves "normal" treatment. If one has pulled oneself up into the ranks of the top performers, one might be in a position to motivate for special treatment or a promotion. Furthermore, one should also allow some time to

Morgenstern – pg.58 of 61
demonstrate that the new levels of productivity are sustained before asking for a better deal.

"But no matter how much you have improved, before you start thinking that the world now owes you for
improving your own job performance - stop. This is _not_ a claim to entitlement. Your compensation is a
reflection of the value the company places on the work itself, not on you personally. For all the psychology
and emotion and personality that are wrapped up in your work, in the end it's not about what _you_ are worth
as a person. It's about what _it_ - the product, the service, the result - is worth to the people who are paying
you to make it happen".

She notes that in the ideal situation both parties feel that there is a fair balance between one's contribution and
one's rewards (including direct benefits, and indirect ones, such as opportunities to gain valuable experience).
She also notes that this balance will change over time, depending on one's personal goals at different career
stages.

Morgenstern then tells the story of one of her clients, Robert, who worked as a lawyer for a large non-profit
organisation. He took this job, with a large pay-cut, after several years working as a corporate lawyer. The
decrease in his income was compensated by the sense of purpose that he got from his new job. After five
years with the non-profit organisation his circumstances changed dramatically as he met a woman who
became his wife. They both dreamed of living in the country, but couldn't afford a country house (and Robert
had little free time to enjoy living in the country). In order to stay in his meaningful job, but enjoy the lifestyle
that he and his wife longed for, he had to come up with a plan. He set out, over a five-year period, to "fuse his
personal goals with the organization's needs". He started by offering to use his specialist skills in international
law to bring in clients who would provide increased funding for the non-profit, and bigger bonuses for
himself. During this time, he also built up a network of lawyers to whom he could subcontract some of the
additional work. This provided a win-win situation for everyone concerned. After four and a half years he
was able to buy his country home. The next step was decrease his working hours so that he and his wife could
spend three days a week in the country, while he worked a four-day week. He was able to redistribute some of
the non-legal work he had been doing to others in the organisation, spreading it out so that no one was
swamped by the redistribution. By focusing on the high-value legal work alone for four days a week, he was
able to bring in as much money as he had done previously in five. His "excellent work record, strong working
relationships, and long-standing commitment to the health and mission of the organization made [this]
possible". When Morgenstern wrote the book, Robert had been working in this way for three years.

Occasionally, problems would arise and he would need to work an extra day or two in a week, but for the most
part, he is able to enjoy the country lifestyle that he wanted. He is very careful to inform people of what he is
doing for the organisation, so that his contribution is recognised, and his employers have his commitment that
is he cannot deliver the expected levels of performance in his four-day week they can challenge his special
arrangement.

Morgenstern notes a few practical strategies that one can learn from Robert's story:
- Take the long view. Robert planned his transition over a five-year period. You needs to be patient if you are
aiming for a special deal. Having a specific goal can provide the motivation to hang on while the pieces all
fall into place.
- Market yourself. You may need to be quite pushy with your employer and colleagues, making your
contribution known explicitly. Most people are already busy with their own jobs and aren't really monitoring
what you are doing closely, if at all. How you communicate your contribution depends on your
circumstances. Robert sends out a weekly email summarising what he has achieved in the past week. He also
schedules some "face time" with key people in the organisation every fortnight.
- Make a no-risk offer to your employer. If you want more money, come up with a plan to earn more for your
organisation, and make your increased compensation dependent on your producing the increased income.
Make sure that the goals and rewards are explicitly agreed to by both parties. If you're negotiating for
improved conditions or perks (e.g. time off for further studies), explain how this will be of benefit to the
organisation. An important part of Robert's proposal was that he would use the five-year period to develop the
network of subcontracting lawyers, who the organisation could later use if Robert wasn't available. In this
way he demonstrated his concern for the mission of the organisation - they wouldn't be stranded when his own
availability decreased. "If you want to be more challenged at work, accompany your pitch to higher-ups with
a timeline and step-by-step process, so they can see that you've thought through the added responsibility and
Leverage Your Value: Strategy #31: Negotiate for Change

In the last four summaries of Julie Morgenstern's book "Never Check E-Mail in the Morning" we have considered each of the "It's Them" factors (i.e. workload, company culture, company changes and compensation). These are essentially out of our direct control as employees, but potentially have a very significant impact on our enjoyment of our work. In any of these situations she states that you have two choices: to "negotiate for change by confronting the issue head-on, or let it roll off your back". This week we consider the first of these.

Morgenstern opens by noting that asking for a change in your working conditions (whether that's remuneration, workload, or something else) is difficult, and you need to be prepared for a possible answer of "no" to your request. To help deal with this she suggests a highly proactive approach: be confident in what you have to offer and prepared to deal with any objections you can foresee. "It's up to you to take charge and ask for exactly what you need". She also notes that even the best proposals are sometimes refused because of external factors that cannot be managed.

In order to frame a tough negotiation, she suggests the following four-step acrostic, TALK:
- Tell them what you need
- Ask for their reaction
- Listen as much as you talk
- Keep it about the work

Tell Them What You Need
"Be calm, clear, simple, and direct, and always come prepared with a few different ideas for solutions". You should take an "upbeat, firm, unapologetic approach", demonstrating your positive attitude to improve the situation, rather than being confrontational.

Ask for Their Reaction
After putting your proposal forward, ask for their reaction: "Is it reasonable? Does it seem fair? Do they foresee any obstacles you haven't already pointed out?". Again, keep the interaction positive, and don't assume that they are will deny your request or be unreasonable. If you expect conflict, you are likely to get it. You should set the tone of the negotiation through your own attitude. As they respond with their reaction, you need to be genuinely open in your reactions (spoken and non-verbal). "Convey that your goal is to find a win-win solution fair to both of you".

Listen as Much as You Talk
In difficult or stressful situations, some people compensate by talking too much, bombarding the other person with arguments, pleading, and restating their case over and over. Don't! "Listening is a great sign of respect". By listening carefully to your employer's views you will usually gain insight into their perspective and their reasons for their answer to your request. When you understand their views, you are in a better position to craft a win-win solution that addresses their primary concerns. While any employer would like to get the maximum effort for the minimum wage-bill, they should also value continuity, loyalty, enthusiasm, and engagement. Morgenstern gives some examples. One of them is if you're requesting a part-time/flexi-time working arrangement to allow you to spend more time with your family, your boss might respond that while they...
recognise your desire to spend more time with your children, they are concerned that the people you manage will not have sufficient guidance. For a win-win solution, you should be able to respond that you've considered that issue, outline your plans for dealing with it, and explain that you will be totally focused on your work when you're at work, without any distractions for getting children to extra-mural activities, dealing with issues like doctors' appointments, etc., which you will deal with in your additional private time.

Keep It About the Work

Try to avoid getting emotional - losing your cool will be likely to affect your ability to think rationally and stay focused on the main issues. "Focus on what is being said, not how it's being communicated". Again Morgenstern gives a practical example: after you have laid out your concerns with the magnitude of your workload and your brilliant plans for handling this more effectively, your boss responds, "Let me sleep on this". A pessimistic approach would be to assume they are brushing you off, playing for time, that they don't actually care. An optimistic approach would be to assume that they as they haven't said "no", there's still a chance they might say "yes", that they just need some time to assess the full implications of your proposal, or that they need to consult with HR, their boss, other colleagues with experience of similar requests, etc.

Morgenstern provides a list of five "hot tips" for tackling these kinds of conversations:

1) Always ask for an appointment. Don't spring an important topic as a surprise - your boss is likely to be defensive if ambushed. Morgenstern also suggests trying to schedule the meeting for a time that is unpressured for your boss: perhaps over lunch, or immediately after work in the evening.

2) Pick the right location. Ideally, both you and your boss should feel comfortable in the setting. As your respective offices have very different comfort levels for each of you, you might want to pick a neutral place for the meeting.

3) Limit the time, and topics. Aim for about 30 minutes, which is usually long enough to have a good discussion of important issues without creating time pressure. Don't try to tackle more than three issues in a single meeting.

4) Write it down. Write a list of the points you want to mention. This will help clarify your thinking and keep you from repeating yourself or rambling.

5) Acknowledge your boss' reality. "Build rapport and reduce defensiveness by demonstrating your genuine understanding of your boss' situation". Express your appreciation for what they have done for you in the past, and your understanding of the constraints within which they must work.

"Bringing up any situation you're unhappy about is not for the fainthearted. Having these conversations is a hard thing to do well". Again, Mogenstern notes that you should assume responsibility for the tone of the meeting, and for striving to find a mutually beneficial outcome. When such conversations go well, you can increase your standing by demonstrating your ability, your confidence, and your positive attitude. But, be prepared for the possibility that it might not turn out the way you hope.

Some things to think about:

1) If you have ever had a negotiation with your employer/boss that did not work out well, why was this? Is there something in Morgenstern's suggestions that might have helped?

2) These principles may help in any difficult conversation/interaction. If you have such an interaction coming up, which of these tips and techniques might you be able to use?