TIME MANAGEMENT TECHNIQUES FOR ACADEMICIANS

Monica Gandhi MD, MPH
Professor of Medicine, UCSF
It's really helped my time management.
Definition of the problem

- “Too much to do” described as single biggest stress by early career faculty
- Of 21 workplace "stresses", 40% were time-related
  - Nearly 80% felt stressed by both lack of work-life balance and "too many time pressure"
  - Nearly 70% already concerned about burnout
- Specific concerns
  - Too much paperwork,
  - Not enough time for research and other academic pursuits
  - Lack of control over how time was spent.

Bellini LM. Stresses and workplace resources for academic junior faculty: track and gender comparisons. Acad Med 2001
Principles of the time management problem in early career faculty

- **New problem:** Medical training very structured and faculty position, fellowship or post-doc may be 1\(^{st}\) time mentee is managing their own time

- **Takes time to gain time:** Learning time management skills from workshop, book may help but takes time to learn

- **Some people don’t want to change:** Chaos may be way of life for some, and they can’t change

*Simply telling someone to be more efficient does not work* – Susan Johnson MD, U. of Iowa.
Basic principles

- Our supply of time cannot be expanded,
- We do not have time to do everything in which we are interested
- Thus, how we choose to spend our time is critical to successfully accomplishing our goals.
# Mentor Development Program Management Matrix

<table>
<thead>
<tr>
<th>Important</th>
<th>Not important</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Urgent</strong></td>
<td><strong>Not urgent</strong></td>
</tr>
<tr>
<td>(MANAGE)</td>
<td>(FOCUS)</td>
</tr>
<tr>
<td>Crisis</td>
<td>Preparation/planning</td>
</tr>
<tr>
<td>Medical emergencies</td>
<td>Prevention</td>
</tr>
<tr>
<td>Pressing problems</td>
<td>Values clarification</td>
</tr>
<tr>
<td>Deadline-driven projects</td>
<td>Exercise</td>
</tr>
<tr>
<td>Last-minute preparations for scheduled activities</td>
<td>Relationship-building</td>
</tr>
<tr>
<td></td>
<td>True recreation/relaxation</td>
</tr>
</tbody>
</table>

**Quadrant of Necessity**
- Interruptions, some calls
- Some mail & reports
- Some meetings
- Many "pressing" matters
- Many popular activities

**Quadrant of Quality & Personal Leadership**
- Trivia, busywork
- Junk mail
- Some phone messages/email
- Time wasters
- Escape activities
- Viewing mindless TV shows

**Quadrant of Deception**

**Quadrant of Waste**
## Exercise

What % of time do you spend in each Quadrant?

<table>
<thead>
<tr>
<th>Important</th>
<th>Urgent</th>
<th>Not Urgent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quadrant I</strong></td>
<td>Crises</td>
<td>Preparation</td>
</tr>
<tr>
<td></td>
<td>Pressing problems</td>
<td>Prevention</td>
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<tr>
<td></td>
<td>Deadline-driven projects, meetings, reports</td>
<td>Planning</td>
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<td></td>
<td></td>
<td>Relationship building</td>
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<td></td>
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<td>Re-creation</td>
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<td></td>
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</tbody>
</table>

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<tbody>
<tr>
<td><strong>Quadrant II</strong></td>
<td>Crises</td>
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<tr>
<td></td>
<td>Pressing problems</td>
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<td></td>
<td>Deadline-driven projects, meetings, reports</td>
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<thead>
<tr>
<th>Not Important</th>
<th>Important</th>
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<tbody>
<tr>
<td><strong>Quadrant III</strong></td>
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<table>
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<tr>
<th>Not Important</th>
<th>Important</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Quadrant IV</strong></td>
<td>Crises</td>
</tr>
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% of time in part depends on your job…

What % of time do you spend in each Quadrant?

- Quadrant I: Urgent, Important
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- Quadrant III: Important, Not Urgent
- Quadrant IV: Not Important, Not Urgent

<table>
<thead>
<tr>
<th>Quadrant I</th>
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<th>Quadrant III</th>
<th>Quadrant IV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urgent</td>
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% of time in part depends on your job…
## Ideal proportioning of time

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<thead>
<tr>
<th></th>
<th>Urgent</th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Important</strong></td>
<td>20-25% (25-30%)</td>
<td>65-80% (15%)</td>
</tr>
<tr>
<td><strong>Not Important</strong></td>
<td>15% (50-60%)</td>
<td>Less than 1% (2-3%)</td>
</tr>
</tbody>
</table>

Quadrant 2 = most effective

Other quadrants = diminished ability to deliver on what’s most important
Need to shift our time to what is important but not necessarily urgent – Quadrant #2

Key Techniques:
1) Managing ourselves
2) Managing our workloads
3) Managing meetings
4) Managing Emails
1) Managing Yourself

- Set aside time to strategically review priorities and accomplishments
- Work during your most productive times
- Don’t do other people’s work
- Watch tendency for perfection
- Learn to Say “No”
Managing Yourself: Don’t Multitask

“Neurologically impossible to pay attention to two cognitively demanding things at once”

Really you’re just shifting attention in rapid succession from one task to the other, causing both to suffer

Resource: *Driven to Distraction at Work: How to focus and be more productive* Dr. Hallowell author
2) Managing Workload – “3Ds”

Drop, Defer, Delegate

▶ What can I DROP?
  ◦ Reports that are no longer required or necessary
  ◦ Meetings that I don’t need to attend
  ◦ Reading that is nice to do but not essential
  ◦ Involvement in committees
  ◦ Chapters
3) Managing Meetings

Two key things: Is this meeting necessary? If so, how to run it effectively?
Is this meeting Essential?

- Non-essential, under your control
- Essential, under your control
- Essential, not under your control
- Non-essential, not under your control
Effective management of meetings

- Make sure the meeting is needed,
- Invite only the people who need to be there,
- Circulate an agenda in advance,
- Start and end on time,
- Stay on topic,
- Create explicit next steps at the end,
- Make sure it is clear who is responsible for each step or task, and
- Follow up to be sure these are done.
4) Managing email

- 1. Turn off the notification announcing each email
  - Distracts from task you are performing
  - Try to check email 3 times a day – beginning, middle, end. If need to more frequently, set timer to check every hour

- 2. Put your contact information in automatic signature
  - Encourage rapid phone calls to avoid confusing email chains

- 3. Keep your inbox small
  - Deal with and delete
  - Create 3 folders: “Waiting for” (waiting for reply), “Projects” and “Reference”
Getting email under control - continued

- Short emails, convey factual information
- Do not convey emotion or discuss political issues (Traceable and best done by phone, person)
- Make subject line informative (not “hi”, but “Location of journal club changed to library”)
- Think carefully – do you need to “cc” that person?
- Unsubscribe - Unrollme.com
- Create drafts as a reminder of what to do
- Try Boomerang – send later
Getting email under control - continued

1. Complete at least one important task each day *before* you look at e-mail (finish the abstract)

2. Set a limit for the amount time you will spend on e-mail at a session – 10 minutes, 30 minutes, 2 hours. Do not get caught up in a never-ending session

3. Work through your messages one at a time, starting with either the most recent or the oldest – and NO SKIPPING!
Working through email

For each message, do one of the following:

1) delete
2) file (reference or a project file)
3) respond / do the requested task, or
4) defer to a later time (try to minimize deferred)
- Decide!
  - Delete
  - Save needed information
  - File
  - Move to Optional Reading folder
  - Do / reply now (or move to “Waiting for”)

- Defer to later
  - Ask “Why?” until you come with a plan to deal with

~ 90% completed
Essential step in time management – saying “no”

- Mentees often get into trap of saying yes to everything
- We can mentor to say “no” to
  - Chapter writing (peer review articles are a better use of time)
  - Joining a committee (that provides no direct career benefit)
  - Devoting excessive extra time to patient care activities (ouch, sorry)
  - Collaborating on someone else's grant (when the research is not central to mentee focus).
How to say no

- Mentees find it difficult to say no to senior colleagues, don’t know what is in your best interest, fearful of missing opportunities
- You (as research mentor) and career mentor can be a sounding board to offer advice for each new activity
- Help provide a cover story – “My Division Chief won’t let me do this”
- Review mentee activities twice-yearly (IDP) and help take things “off the plate”
Mentor should HOPEFULLY help create a work environment that promotes both productivity and well being

- Current academic structure demands
  - Constant email contact, no vacations, working long hours, little sleep

_Myth: The best way to get more work done is to work longer hours._

- No single myth is more destructive to employers and employees than this one. The reason is that we're not designed to operate like computers — at high speeds, continuously, for long periods of time.

- Instead, human beings are designed to pulse intermittently between spending and renewing energy. _Great performers — and enlightened leaders — recognize that it's not the number of hours people work that determines the value they create, but rather the energy they bring to whatever hours they work._

Schwartz, Tony. HBR Blog Network; Four Destructive Myths Most Companies Still Live By
Approach to Planning our Work

- Daily Planning
- Weekly Planning
- Long-term/Short-term Planning
Tracking work

**TODAY**

1. The things you habitually do without needing a written reminder

2. Calendar

3. Daily task plan

**Master Project List**

All work that is currently in progress, or needs to be started soon.

**Ideas for later list**

Anything you are planning, or might considering doing, later – keep either on a list, or on the calendar
Rule 1
Keep one calendar that includes all your time commitments
**Rule 2**

Use a calendar with a daily view option that includes both a time grid and a “note” section.
Calendar

- **8**
  - Conference call

- **12**
  - MEETING

- **5**
  - make dinner /spaghetti and meatballs

Time grid

- Events – everything that you have agreed to “attend”
Calendar

- Conference call
- Travel between meetings
- MEETING
- make dinner /spaghetti and meatballs
Calendar

Time grid

- Events
- Transition time
- Tasks that must be done at a specific time

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>Conference call</td>
</tr>
<tr>
<td></td>
<td>Travel between meetings</td>
</tr>
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</tr>
<tr>
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<td>= call john re: tomorrow’s meeting</td>
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<td></td>
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Calendar

- Conference call
  - Travel between meetings
- MEETING
  - = call john re: tomorrow’s meeting
- Work on first draft division budget
  - = Take meeting folder home
- make dinner / spaghetti and meatballs

Time grid
- Tasks that must be done at a specific time
- Events
- Transition time
- “Appointments with yourself”
### Calendar

**Today: Pay visa bill**

<table>
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<tbody>
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</tr>
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<tr>
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</tr>
<tr>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

### Notes

- Tasks that **must** be done sometime today
Calendar

Pay visa bill
WF Jane to email back

Notes

- Tasks that must be done sometime today
- WF people you are waiting for responses from today
### Calendar

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</tr>
<tr>
<td></td>
<td><strong>WF Jane to email back</strong></td>
</tr>
<tr>
<td></td>
<td><strong>DEADLINE paper submission due</strong></td>
</tr>
</tbody>
</table>

### Notes

- **Tasks** that **must** be done sometime today
  - **WF** responses you are **waiting for** today
  - **Deadlines**
### Calendar

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<tr>
<td></td>
<td><strong>DEADLINE paper submission</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Reminder Submit time sheets (weekly)</strong></td>
</tr>
</tbody>
</table>

### Notes

- **Tasks** that **must** be done sometime today
- **WF** responses you are waiting for today
- **Deadlines**
- **Reminders**
  (e.g. daily, weekly, monthly, annual, irregular)
The hard landscape:

When appointments and tasks are done, you can go home!
### Master list

#### Personal

Research new bicycle choices for Harry, an narrow to two choices for his review

Send invitations to my family for Labor Day party, *by mid-July*

* ... and so on *

#### Work

Create draft of new evaluation system for team to review

Hire new secretary II

Finalize budget for fall speaker program

* ... and so on *

#### Features:

- All planned work*
- Both work and home
- Items described as results
- “Running” format

* Except calendared events and daily routine tasks
<table>
<thead>
<tr>
<th>Project</th>
<th>Goals</th>
<th>Actions</th>
</tr>
</thead>
</table>
| Mentoring meeting in October | Plan the meeting | 1. Start agenda  
2. Plan outside speakers  
3. Check registration |
| WIHS | Submit revised TFV paper  
Complete ATV PK paper  
Complete TB paper | 1. Finish TFV paper revisions  
2. Look through final models sent by Chengshi  
3. Make final multivariate table and send to group  
4. ATV-CROI abstract  
5. Start drafting ATV PG paper  
6. Finish TB paper |
| ROI | Submit STRAND paper  
Submit NPV-TLC paper  
Complete TFV methods paper  
Maternal hair samples, PROMOTE abstract  
ASPIRE concept sheet  
SMARTT concept sheet revision | 1. Wait for AI's comments  
2. Submit TFV STRAND paper  
3. Edit NPV-TLC paper from Yong  
4. Await input on NPV-TLC paper, Peter, Yong  
5. Finish NVP-TLC paper after Yong's input  
6. Write TFV methods paper  
7. Analyze maternal hair PROMOTE data  
8. Write Yong about maternal samples  
9. Write ASPIRE concept sheet  
10. SMARTT concept sheet (address site support; power calculations; clarification of duration of exposure studied in hair and covariates analysis) |
| Mentoring grant (R25) for January | Draft specific aims  
Write paper with Mallory on first mentoring meeting  
Move forward work on Peru and Africa papers | 1. Write David by July 12  
2. Talk to David July 12  
3. Edit methods/results section next  
4. Submit paper  
5. Write results/ discussion of SF meeting |
| Talks | ID boot camp  
HIV MMA | 1. HIV talk for ID boot camp  
2. Meningitis talk for ID boot camp  
3. Single pill combination talk  
4. Epi talk for MMA |
Getting started with a master list for your mentee

- Record what is on your mind:
  - What do I need to finish this week?
  - What do I need to finish in the next month or so?
  - What do I need to finish by 3 to 6 months from now?

- Add what is already in your system:
  - Add items from any existing to-do lists
  - Go through your calendar for the next few months

- List each of your areas of responsibility (i.e. “hats”) and ask for each, what do I need to do for this “hat”
  - “Hat” Examples: Parent, Partner, Runner, PTA President, Residency Director, Clinician, Division Director, Grant PI
Refining process

- **For each item:**

1. Is this something I am committed to do?
2. Is this the right time to do it?

<table>
<thead>
<tr>
<th>List Destination</th>
<th>1ˢᵗ - Committed?</th>
<th>2ⁿᵈ - Now?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Master List</td>
<td>-</td>
<td>Ideas for later</td>
</tr>
<tr>
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</tbody>
</table>
## Paper / document based options

<table>
<thead>
<tr>
<th>Paper</th>
<th>Document file</th>
</tr>
</thead>
<tbody>
<tr>
<td>Legal pad</td>
<td><strong>Word document</strong></td>
</tr>
<tr>
<td>3-ring binder</td>
<td>Excel spreadsheet</td>
</tr>
<tr>
<td>Index cards</td>
<td>Plain text file</td>
</tr>
<tr>
<td>Post its™ stuck in a single location</td>
<td></td>
</tr>
</tbody>
</table>
# Sample list manager programs / apps

<table>
<thead>
<tr>
<th>Free, any OS</th>
<th>any OS / web based</th>
<th>iOS only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remember the Milk</td>
<td>Outlook Tasks</td>
<td>OmniFocus ($$)</td>
</tr>
<tr>
<td>Toodledo (premium version $)</td>
<td>Doit.im ($)</td>
<td>Things ($$)</td>
</tr>
<tr>
<td>Wunderlist</td>
<td>Nirvana ($)</td>
<td>Reminders</td>
</tr>
</tbody>
</table>
Ideas from UCSF CFAR mentees

- G-calendar (tasks function)
- “Morning pages” (write 3 pages out in the morning – creative);
- Put phone away
- Amazon Alexa (Alexa, add x to shopping list; add tasks to task list- can do with Siri)
- Shared Google keep (keep.google.com; shopping lists or shared projects)
- Evernote
- “Managing your energy, not your time” (helps you say yes/no to certain things)
- Fantastical* - can integrate google calendar and outlook under one calendar (can keep personal/business separate if you want)
Questions?