

The Smart Calendar Approach to Maximize Workflow

By Karen Whiting

A calendar, whatever style you choose, becomes a powerful tool to track work and organize your schedule. Here's a few tips...

Keep Track of Workflow

Projects flow into your business via email, snail mail, meetings, or phone calls. It's hard to track scattered information. Schedule time to update your calendar or add information as you receive it.

For each new project include deadlines, contact information, meeting locations, notes, and other pertinent details. Add the file name for the project. If an email is too long to include details on the calendar, add the date of the email or copy/paste the contents into a document. Add the file name in the calendar. Flip to a week or month later and add a reminder to review the progress of the project.

Do you tend to forget to check your digital calendar? Set the alarm to automatically remind you of important activities.

Build in Time Cushions and Planning Days

Interruptions and unplanned urgent new projects cause havoc if your calendar is bursting. Schedule time cushions to allow for the unexpected.

Build in days to evaluate your business and strategize. Place these in the calendar with notes of any projects you want to review.

Set aside at least one day a month for administration purposes. Add notes on errands to run, invoices to follow up on, papers to sign, and calls to return on the admin calendar dates.

Color Code

Most calendars have a tool to add color and highlighters for printed planners. Color-code similar activities. Categories can be general such as meetings and correspondence, or specific for each project. One glance will reveal where time is allocated or what type of activity is on the day's agenda.

Prioritize

Focus on the vital. If a week looks busy, move the most important tasks to earlier in the week during the time of day you're most energized. If you're facing a time crunch, delegate work or move tasks that can wait until a lighter time period. To avoid procrastinating, schedule something fun after committing time to a harder task.

Schedule Repeating Activities

Digital calendars make it easy to schedule repeating activities. When you schedule a recurring activity click on repeat, and choose the frequency.

To locate a calendar item search with the key word and all should pop up in a window (usually below the calendar). For printed planners, highlighted colors help you locate entries.

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