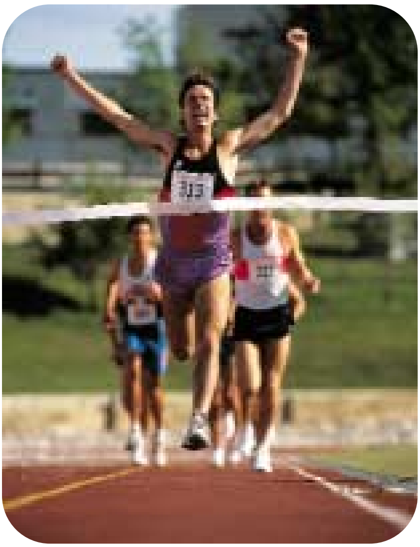
Time/Design®

Quick Start Guide

CONGRATULATIONS

on your choice of the award-winning Time/Design Management System!



While the Management System is an unparalleled tool for any busy person, you will uncover more functionality and support from it once you know how the System is designed to work. The Quick Start Guide is a simple self-directed program to get you on the System and using it to its fullest potential. This program, when combined with the online tutorial, will put you in the ranks of the Time/Design power users, some of the most effective and stress-free people in the world!

The Time/Design Management System is the most flexible and adaptable personal organizer on the market. While it was designed for specific purposes, its applications are almost limitless. This program has been designed to provide you with a framework for using your Management System. As time progresses, as your

needs change, and as you make your System uniquely yours, the layout and functions of the Management System will change. The positioning, and even the function of sections may change. That's the beauty of Time/Design. Just like fingerprints, no two Time/Design Management Systems are ever identical.

Good luck with this self-directed program. If you need more information on any of these concepts or if you want some personalized help, please contact us at 800-637-9942 or at customerservice@timedesign.com. Any of our Productivity Consultants will be able to help you on your way to increased productivity and decreased stress. We make every effort to respond to customer service email within one day during the normal business week.

Session 1

Life can be very complex. You need to manage commitments to yourself, to others and others' commitments to you. You have to communicate with family, friends and colleagues. You are constantly being barraged with information. Keeping all the components of your life organized is an ongoing challenge. Before we can organize it, let's get all of this information down in one place so that we can start categorizing it. When your computer is low on memory, what do you do? Add memory? Download files off of the hard drive? Why not give your brain the same opportunity? After all, it's only human.

As you go through this exercise, you may feel overwhelmed realizing all the "stuff" you need to do. Keep writing. You'll thank us for it later – we promise!

The mental download is even easier than the computer download. Grab a pencil and a piece of paper, sit down and review the following list. Write one item per line and don't worry about organizing it. Capture everything that comes to mind as you review the following trigger list.

At work, mentally walk around your desk, files, bulletin boards, etc. Think about:

- •Current projects you are working on or just about to begin
- •Projects you will be starting in the next few months
- •"Someday/maybe" projects you would love to get to if you had time
- •Projects or activities you need to delegate or follow up on
- •Periodic activities (e.g., monthly reports)
- •Phone calls you need to make
- •Email messages, letters or faxes you need to send
- •Anything you need to write or read or Internet-related
- •Things you are waiting for from other people (a call back, information,etc.)
- •Anything on a "to-do" list or Post-it™ Note you need to do
- •Things you need to ask/tell people you speak with regularly
- •Anything you need to schedule or reschedule

What about yourself and your friends/family. Think about:

- •Vacation or events that need planning
- •Children's school, sports, clubs or other activities
- •Appointments to be made (medical, dental, hair, vision, legal)
- •Dry cleaning, tailoring, items needing repair (jewelry, watches, appliances)
- •Financial matters (banking, financial planning, insurance, appraisals)
- •Gifts or cards for upcoming occasions
- •Correspondence that needs attention
- •Volunteer work, clubs, organizations you belong to
- •Exercise, athletics, hobbies, reading
- •Religious, spiritual, emotional realms

Picture your home.Think about:

- •Routine chores you need to do
- •Errands you need to run and things you need to buy
- •Maintenance, redecorating, renovation, expansion projects
- •Anything on a "to-do" list or Post-it™ Note you need to do
- •Home office projects and anything Internet-related
- •Things to ask/tell friends, family members or others you speak with regularly
- •Outdoor projects needing attention
- •Car maintenance you need to do or arrange
- •Pet care

Looking toward the future, think about:

- •Personal and professional goals, dreams and aspirations
- •Things you would like to do, have or achieve
- •Classes or things you would like to learn
- •Places you have always wanted to visit

Now that you have everything down on paper, review this list and apply the following **5-D Filter™**. Look at the things that you ought to do, but really don't need or want to do. Do all those pictures in that drawer need to be organized and filed neatly away? If you don't particularly want to, or have to, tackle that project, **Dump it**. That's right, just cross that "to-do" right off your list. Don't you have enough things that you don't want to do? Home and yard chores don't take up enough of your valuable time?

Next, identify the projects that will not begin or complete in the next 60 – 90 days. We will **Defer** these items to the *"future,"* so mark them with *an "F."*

Now, what on that list needs to be done, but not necessarily by you? If you're not already proficient in this skill, it's time for you to get more familiar with the ability to **Delegate** at work or at home. If you have anybody living in your home over the age of 5, you can probably delegate more than you do. Can you hire somebody to paint that room or mow the grass? Think about how much *your* time is worth in comparison and give it a try. Chances are it will take some of the pressure off. Note the tasks you intend to *Delegate with a "D."*

Okay, you still probably have a considerable list in front of you. Now is the time to **Differentiate** the projects and tasks that are high impact from those that are more detail oriented.

A clue to identifying one from the other is this: high impact items tend to start with impressive-sounding, *big verbs* (design, implement), occur over time and involve multiple steps. By their very nature, these will be high priority items. These big picture items need to be looked at both as the goal, and with an eye for the details that make up the big picture.

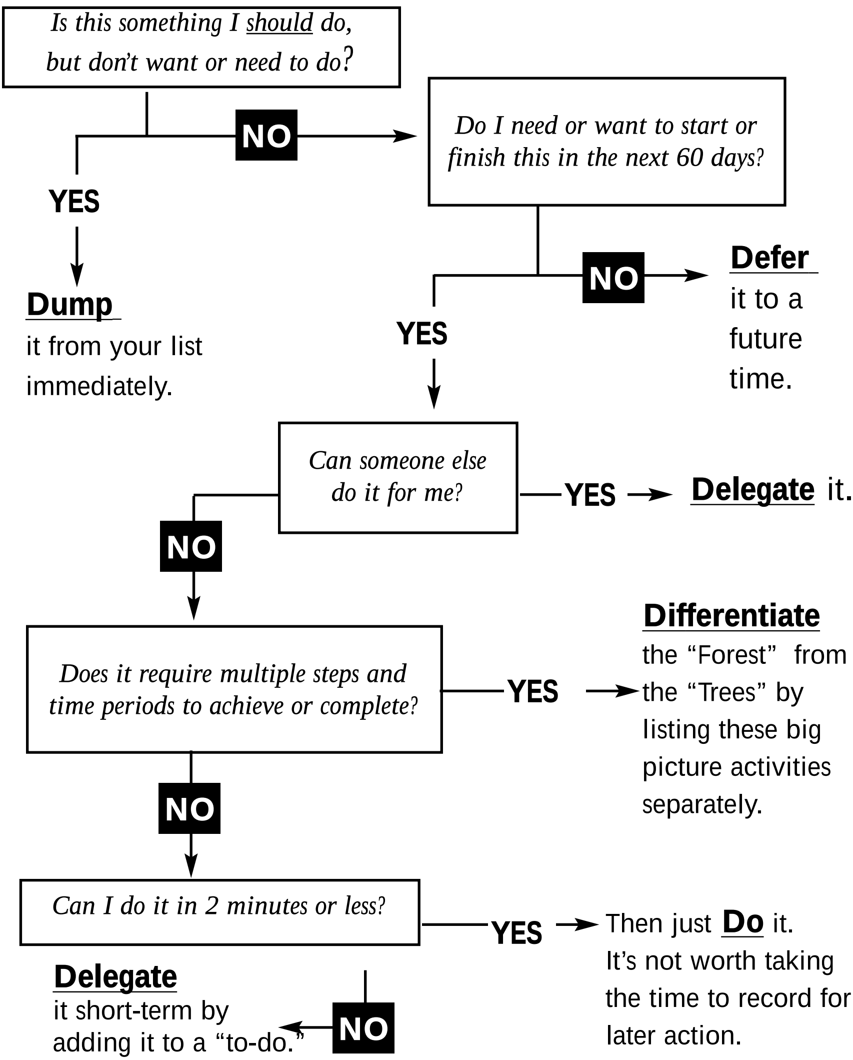
Learn to see the forest for the trees. Details tend to have *little verbs* (call, pick up) and are usually fairly quick and easy to accomplish. Often times, the details are linked to a high impact activity. Some will be time-sensitive tasks, limited to a certain day at a certain time. A meeting or doctor's appointment would be one of these. Mark the time-sensitive items with an *"A" for appointment.* Again, we'll return to this later when the Management System is ready to capture that information.

Usually, time-sensitive items only comprise 5%– 20% of a person's list. Anything that is a big picture goal *or project, mark it with a "P*." What do you do with the rest of the stuff on your list? Whenever possible, apply the two-minute rule: if you can get it done in two minutes or less, take some advice from Nike™ and *just* ***Do*** *It*. The leftover items will find their place in the grand scheme of things as we progress.

The 5-D Filter

Information is infinite. However, the ways information can be organized are finite. Information can be organized by: 1) alphabet 2) location 3) continuum 4) category and 5) time.

Time-specific activities you must “do on” a particular date go on a calendar; commitments that are “due by” a date should be organized by category. The 5-D Filter gives you a realistic picture of your commitments by sorting activities into logical categories.



Differentiate the "Forest" from the "Trees"

Just about everyone writes a "to-do" list. Optimal performers, though, commit their big picture activities to writing as well. That way, they are better able to differentiate the "forest" from the "trees." The forest consists of your big picture activities (develop strategic plan, redesign website or create training program). The trees are all the individual details (call Fred, get new collar for Corky).

Big Picture activities consist of **goals** and **projects** that are:

> *High Impact:* For example, meeting and exceeding job or business objectives; matters related to personal development, emotional and physical health and safety; forming and sustaining relationships with key people in our work and personal lives.
>
> *Achieved Over Multiple Time Periods:* Achieving a significant goal is rarely a one step project; rather, it is realized over multiple time periods. It's the same with projects. Projects like "reorganize department" or "relocate to Florida" do not happen overnight. Goals and projects require multiple time periods to finish.
>
> *Multi-Step:* Some goals, and all projects, consist of multiple steps. A goal to "increase sales" could be achieved by implementing one or more projects (e.g. upsell to current customers, expand product line). Each of these projects, and possibly sub-projects, might entail anywhere from 10 to 100 or more steps.
>
> The goal "get in shape" *could* involve a multi-step project (e.g. get physical check-up, investigate local health clubs, etc.). However, this same goal might simply require carrying out the same basic step over multiple time periods by jogging three times a week. In this case, it is best to use a technique known as "time blocking" where you achieve a goal by blocking out time for this activity on your calendar.

> *"If you believe that you can, or if you believe you cannot, you are probably right."* — *Mark Twain*

Session 2

Next, we’re going to familiarize you with the general layout of the Management System.

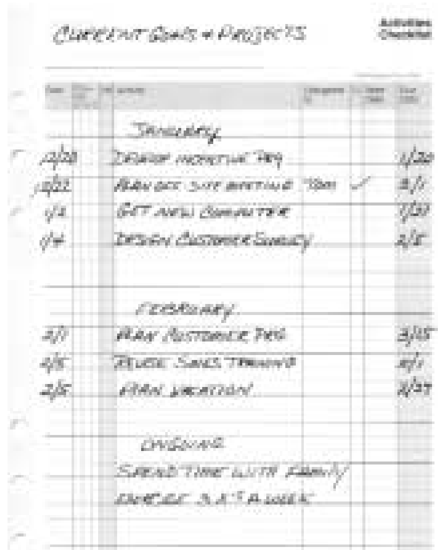
You don’t need anything other than the binder, dividers and the storage box you received.

1. Verify that the dividers in your binder are in the following order from front to back:

- Activities
- Overviews
- Daily Plans
- DataBank
- Dividers 1-10
- Information 
- 
- 
- A-Z dividers

2. From your storage box, please remove two **Activities Checklists,** located behind the divider of the same name (the fourth gray divider past the red **Daily Plans/Archive divider**). Right now, these should have the fold on the right and the holes on the left.

3. Behind the **Activities** divider in your binder, place two **Activities Checklists** folded on the right. Fold out both, stack them, and then re-fold (this is "nesting"). Label the top form "**Current Goals & Projects**."



4. Please take out two additional **Activities Checklists** and fold them back the opposite way (this is called a reverse fold). These **Activities Checklist** now appear with the fold on the left and the holes on the right.

5. Place the two reverse folded (with the fold on the left) **Activities Checklists** behind the **Daily Plans** divider. These, too, should be nested with one on top of the other. Title the top one "**Next Actions**" and the bottom one "**Waiting For**."

6. Behind the **DataBank** divider, insert a **DataBank Key** (located behind the **DataBank Keys** divider in thestorage box). Write in "Voice Mail" next to #1, and "Frequent Communications" next to #2. Remove four sheets of lined paper or telephone logs, located behind the gray **Personal** divider. Place two sheets behind divider **1** and two sheets behind divider **2**.

Session 3

You should have with you whatever materials you have been using to keep track of your life: calendars, planners, notes, sticky papers, writing on the palm of your hand... you get the picture. And, don't forget the download list we worked on earlier.

1. From your storage box you will need:
   - **Daily Plans** or **Weekly Plans** for the next two to three weeks, or at least until the end of the current month. Any expired pages can be recycled or used as note paper.
   - **Monthly Plans** for the next three months (not including this month, though), located behind the Monthly Plans divider. Again, any expired **Monthly Plans** may be discarded. You'll notice that these don't look like the monthly calendar pages you are used to seeing. There are distinct advantages to using the linear style you see in your Time/Design, as opposed to block calendars.
   - The **Yearly Overview**, for the current year.
   - The **Perpetual Calendar** found behind the **Personal Divider**
2. In the **Overview** section in your binder, starting from top to bottom, please place:
   - The next three months of **Monthly Plans**, with the most recent month on top.

- The **Yearly Overview** for the current year.
- The **Perpetual Calendar**.

3. Arrange the Daily Plans section as follows:
    - On the right, place your **Daily Plans**, face up. These should face the **Activities Checklists** you inserted in the prior session.
    - Your Time/Design bookmark is designed to peel off and on the rings of your binder. Put this over your daily plans. (***Hint:*** the bookmark has our toll-free number on it for your convenience.)

Now that we have the basic set-up in place, let's get the System working for you!

4. On the **Yearly Overview**, place a diagonal line through all the months that have passed, including this month. Also, cross out the next three months because you already placed those **Monthly Plans** in your **Overview** section.

Go back to your download list and transfer all the items marked with an "A," plus all of the appointments on your current calendar, to your **Monthly Plans** and **Daily Plans**.

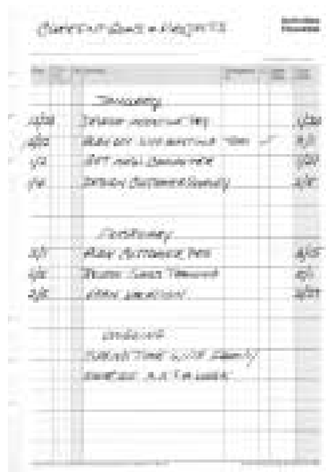
- The calendar portion of your **Daily Plans** should only list time specific events, such as meetings or appointments. Anything not restricted to a date and time belongs somewhere else.
- Transfer any mid-range appointments (30-90 days out) to your **Monthly Plan** and long-range (more than 90 days away) appointments to your **Yearly Overview**.

With all of your scheduling pages in place, you have a view of your upcoming schedule. You can focus more quickly on mid-range planning. What is happening in the next 30-90 days? What action do you need to take? Focus in greater detail on projects and tasks as they get closer! As the months pass, you will insert the new Monthly Plan, nested underneath the existing plans. Expired Monthly Plans can be nested around expired Daily Plans and placed in the "Daily Plans/Archive" section of the storage box.

Session 4

Next, we'll take a closer look at the sections we set up in Session 1.

1. Current Goals and Projects



This form was placed in the **Activities Section**. This page is for listing projects that you will begin, work on, or end in the next 30-90 days. When the System is open in front of you, you can extend this page to the left while working in other sectons (we like to call it "windowing"). This technique enables you to always "keep an eye on the big picture." Staying focused on your high-impact goals (the forest) is a great way to keep from getting lost in "the trees" of details.

At any given time, you should have documented one or two **Next Actions** that directly relate to each **Current Goal or Project**. When looking at a project, always determine, what is the single next step to achieving your goal? *What is your Next Action?*

> *"An ounce of action is worth a ton of theory."* *Fredrich Engels*

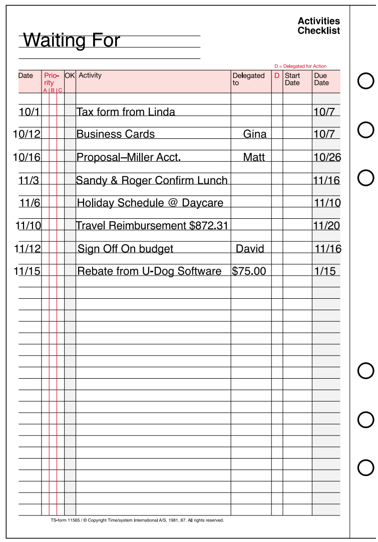
When you have completed one of these tasks, highlight it to show it has been accomplished. This is also a wonderful tool to avoid procrastination. When a big project is intimidating to you, ask yourself, "What’s my Next Action?" That one single step will feel pretty do-able, and you’ll find that projects continue to move forward, despite how overwhelming they may seem.

2. Next Actions

The “**Next Actions**” page was placed in the **Daily Plans** Section. **Next Actions** are those things that you have to do, but are not restricted to specific dates or times. "Pick up the dry cleaning." "Call Fred."

3. Waiting For

This is the reverse folded **Activities Checklist** located under the Next Actions list. Use this to keep people accountable to you. When you leave a message, make note of it. When you delegate a task to somebody, make note of it. When somebody promises you something by a certain time, make note of it. Not only will you be able to quickly review what is outstanding but, when your team member notices you writing down that he’ll have his recommendations to you in two weeks, well, you can be sure he’ll be writing it down too.


Activities Checklist

Waiting For

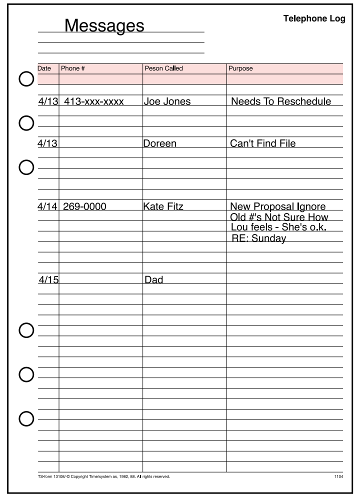
D = Delegated for Action

Date	Prio-rity A/B/C	OK	Activity	Delegated to	D	Start Date	Due Date
10/1			Tax form from Linda				10/7
10/12			Business Cards	Gina			10/7
10/16			Proposal–Miller Acct.	Matt			10/26
11/3			Sandy & Roger Confirm Lunch				11/16
11/6			Holiday Schedule @ Daycare				11/10
11/10			Travel Reimbursement $872.31				11/20
11/12			Sign Off On budget	David			11/16
11/15			Rebate from U-Dog Software	$75.00			1/15

Hint: This section is also wonderful for recording confirmation numbers on orders you have placed.

4. Voice Mail

The title of this section says it all. Found behind DataBank section 1, you can jot your messages here, in one central location. You will easily be able to track who called, when and why. Regularly review this log and no longer will you forget to return a call. This will eliminate searching for that scrap of paper with so-and-so's message on it, or finding an errant phone number and wondering to whom it belongs. Archive these pages when you are done with them.



Messages

Telephone Log

Date	Phone #	Peson Called	Purpose
4/13	413-xxx-xxxx	Joe Jones	Needs To Reschedule
4/13		Doreen	Can't Find File
4/14	269-0000	Kate Fitz	New Proposal Ignore Old #'s Not Sure How Lou feels - She's o.k. RE: Sunday
4/15		Dad	

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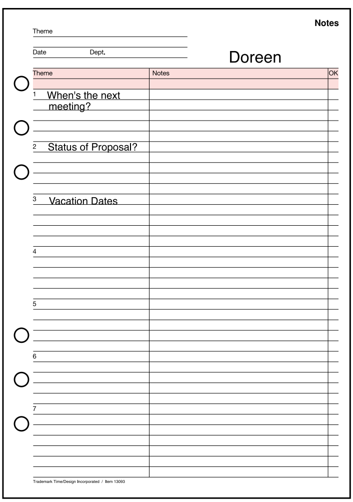
5. Frequent Communications

On each sheet of paper write the name of a person, or a group, with whom you communicate frequently. This may be a supervisor, colleague, project team, family member or friend, to name a few. When you realize that you have something to communicate to one of these people, instead of jumping up from your desk, or dropping everything to pick up the phone, jot a note on that person's page. When you meet with them, review your list. You can reclaim up to an hour a week just by eliminating the "do you have a minute?" interruptions that occur all too often.

6. Contacts

The last part is to fill in the Contacts section of your System. If you are currently keeping address, phone and email information on your computer, you can easily print that information and insert it into your Management System. Otherwise, there are plenty of **Telephone/Address** pages in your storage box that you can use to capture that information.



Success Tips

- Locate a page more quickly by writing names on the right side of the page and organize alphabetically.

- As you think of information you need to communicate, note it on the appropriate person's or group's page.

- As you plan a project, ask "Who does this impact?" or "Who needs to know?" Note it on that person's page and build this communication into your plan steps.

- If something comes up during a meeting that is relevant to someone not in attendance, make a note of it on his or her page.

- When communicating with others by phone, in writing, or in person, refer to your Communication section for items you need to discuss.

Session 5

Hopefully, you are now starting to see how your Management System helps to keep you focused on short - and mid-range plans, current goals and next actions, but what about your future? Think about all the things you want to do, accomplish, or see in your lifetime. Perhaps you want to visit an exotic land, build an addition to your home, or learn to ride a camel. These goals need a permanent place to be documented and put somewhere on your "radar" so as not to be overlooked.

> *"There are two kinds of failures: Those who dream and never do, and those who do and never dream."* *Faith Popcorn*

In the **DataBank** you probable noticed that section #9 is already labeled with "Personal." From your storage box, take out a few pieces of lined paper, or **Activities Checklists**. Put your dreams in writing. Take your time. Think about home, personal, career and family goals. When your list is complete, put it into section #9. Keep it there, and review it often.

You have been given direction on three of the **DataBank** sections. But what about the rest? The answer? What you do with your **DataBank** is entirely up to you. Use these sections to organize information by category.

> According to Richard Saul Wurman, author of *Information Anxiety*, information is infinite. However, the ways information can be organized are finite. Information and, in most cases, activities can be organized by:
>
> 1) Alphabet (files, contacts, spices)
> 2) Location (office locations, territories, time zones)
> 3) Continuum (range:larger clients–smaller clients, higher revenue to lower)
> 4) Category (personal, professional, by individual, by project)
> 5) Time (day, week, month, year)

Some examples of what you might dedicate a DataBank section to:

- Home buying or renovations
- Meeting notes
- Clubs/events you participate in
- Budgets/financial reports
- Customer/client relations info
- Freelance projects
- Price list/discount schecule
- Performance reviews
- Info on children or parents
- Christmas list

You probably get the idea by now. The DataBank is one of the most useful tools of the Management System. Use it to customize the System to your particular needs.

Great Ideas for Using Your DataBank

Professional

- Brainstorming notes
- Budgets and billing codes
- Business plan outlines
- Charts
- Client/prospect lists
- Communication pages for staff, manager, key contacts
- Company or department goals
- Computer notes, commands, codes, files
- Equipment lists or specifications
- Expense account
- Financial reports or projections
- Ideas
- Inventory
- Internet information & websites
- Hiring/staffing
- Maps and directions
- Marketing plan
- Meeting agendas
- Notes
- Organizational or team charts
- Passwords, PINs & special codes
- Performance plans
- Presentation outlines and notes
- Pricing information
- Product information
- Professional goals
- Project checklists

Personal

- Bank/financial information
- Books or music to buy
- Budgets
- Checking/savings account information
- Clothing sizes
- Credit card 800 numbers
- Equipment (appliance model serial numbers, warranties)
- Exercise (sports records or schedules)
- Family information
- Gardening information and ideas
- General notes and ideas
- Hobbies
- Important dates/birthdays
- Inspirational quotations or affirmations
- Internet information & websites
- Investment tracking
- Medical information
- Personal goals
- Personal or home projects
- Recreation (equipment, checklists, maps)
- Restaurants (inns, wine lists)
- Schedules: school, sports

Session 6

In the storage box, you will find a variety of forms. These are provided to give you maximum benefit from your Management System. You have already seen how the Time/Design Process is different from traditional time management techniques. Some old habits you will probably need to unlearn. These forms will encourage you to continue organizing information independent of a calendar. Let's explore some of the forms provided.

Don't restrict the **Activities Checklists** to **Next Actions**, **Waiting For**, and the rest of the purposes suggested here. Be creative. The nesting and windowing features of these forms make them quite useful in many situations. For example: use the **Activities Checklist** for your **Future Goals and Projects**. Nest this around the other records you keep in that same **DataBank**. This way, every time you look to your personal records, you will be stimulated to review your list of life goals!

Project Management forms are useful for establishing an action plan. Write out your goal for a project, and be specific. Follow the prompts provided by the form to establish milestones, Next Actions, contingency plans, etc.

How many times have you left a meeting not quite sure what, if anything, you need to do next about the topic? Use the **Business Meeting Checklist** to change that (consider dedicating a **DataBank** to meeting notes). Record the issues to be discussed, participants and any **Next Actions** arising from the discussion. You can even make photocopies to hand out to the rest of the participants so everyone leaves the meeting with the same understanding.

Notes and **Reports** will offer you formats other than simple lined paper to capture information. Choosing between unlined, lined, **Activities Checklists**, **Notes** or **Report** paper is simply a personal preference.

Matrix Diagrams can be used for so many things. Teachers can use them to record grades. They work well for tracking bill payments, progress of repeated projects, vaccinations for pets, or even for the progress of a child's chores!

Expense Envelopes can be found behind the dark gray divider labeled **Financial**. Lined and Graph paper is provided behind the **Personal** divider. The numbered pencil dividers are provided for you to store additional forms you may use, or to archive information. (Time/Design offers more than 40 types of forms. Contact a Productivity Consultant for assistance at 800-637-9942.)

Now you should have a complete understanding of the versatility of the Management System. Strive to become an Advanced Time/Design user, learning some power tips on making the System work for you!

Session 7

Take a look at the **Information** section of your storage box. Here you will find everything from maps to distance calculators, international climate conditions to wine guides, even international holidays, so you can really impress foreign customers with your knowledge of their culture! Go over these and see what interests you. Keep any you might find useful in your System. You will find the same **Information** divider in your binder. You can even design your own forms.

Session 8

Every day, try to spend 5 minutes in the morning reviewing your Current Goals & Projects and Next Actions. This is an important step to help you focus on the Big Picture before you get bogged down in the trees (emails, voice mail, etc.) At the end of the week, you should review your System too. Keep your binder lean and mean with a weekly review as follows:

- Do a mini-download
- Update your **Current Goals & Projects** page, **Next Actions**, **Waiting for**, **Monthly/Weekly/Daily Plans**, and **Frequent Communications** as needed.
- Review your **Current Goals & Projects** page. Highlight completed items. Make sure each item has a next action and note it on your **Next Actions** page.
- Review your **Next Actions** and **Waiting for** pages. Highlight items you've completed or that are no longer pending.

- Transfer expired **Daily/Weekly Plans** to behind the red **Daily Plan Archive** divider in the storage box. Add a new week of **Daily** or **Weekly Plans**.
- Check your current **Monthly Plan** for any commitments, to-do items or due dates for the upcoming week. Note these on your **Next Actions** page or appropriate calendar pages.
- Check your **Next Actions** page for due dates for the upcoming week. If necessary, make an appointment with yourself to prepare for these. Block out time on the **Daily/Weekly Plan** for these tasks.
- Review your **DataBank** sections. Note any new projects on your **Current Goals & Projects** page. Note any **Next Actions** on the **Next Actions** page.

Time/Design offers Management System users lifetime support. We encourage you to contact us for any questions you may have about usage, set-up or customization of your System. Be sure to visit our website at www.timedesign.com for our online shopping cart, seminar information and tips.

As always, you can contact Time/Design Productivity Consultants via our toll free number, **800-637-9942**, or by writing **customerservice@timedesign.com**. This information is provided on your binder's bookmark, so we're never far away.

Time/Design®

Too much to do in too little time? ***Discover Focus Management***

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