Practical Manager

personal and team results tool

practical
Manager

Practical Manager user guidelines

Introduction to Practical Manager!

Welcome!

Practical Manager is the online tool that helps increase personal and team productivity and achieve business results.

Use it as a personal results tool. It also enables you and your teams to create leadership excellence by establishing and maintaining the Employeeship company culture and implementing a thorough managerial behaviour.

The main areas of Practical Manager include:
- personal time management and results tool
- personal and team managerial behaviour tool
- company and team culture development tool

Practical Manager is a tool that helps you and your teams:

- Develop and maintain an Employeeship culture by focusing on values that create business excellence.
- Share recognition for the values that are important in your organisation, catch people doing things right and share recognition
- Achieve results by focusing on what matters for the team and exercising results-oriented time planning as a team.
- Improve performance and personal effectiveness by focusing on the essence of managerial behaviour.

What is Employeeship?

Employeeship is what it takes to be a good employee, just as leadership is what it takes to be a good leader.

When an individual makes a wholehearted, goal-oriented effort to ensure the organisation's success, a special kind of personal commitment emerges, we call this commitment *Employeeship*.

When all employees are deeply committed to the organisation's survival and development and thus demonstrate Employeeship, the organisation can be said to have an *Employeeship culture*.

Amongst the many elements that characterise a good employee, the following three are essential: responsibility, loyalty, and initiative.

These three over-all concepts reflect the attitudes and behaviours of people who are "good employees". People display Employeeship when they:

- "play" for themselves and the "team" to win
- take responsibility for the results of the organisation
- are loyal to the people and goals of the organisation
- take the initiative to improve the organisation's *productivity*, *relations* and *quality*

The success of any organisation is put in the hands of *managers and employees* equally; therefore, it's their *shared responsibility* to *create a culture* of Employeeship and mobilise everybody's energy to win.

Avoid the trust and commitment gap

Leadership, managerial behaviour, and results-focused management promote trust. You can create openness and trust in your team by exercising *excellent personal managerial behaviour* and by *showing undivided attention and positive recognition* to others: when you delegate tasks, praise the behaviour or congratulate others for achievements; in other words, by catching people doing things right.

Practical Manager helps you focus on what matters for achieving your personal results and manage your team to achieve the best performance. This is why Practical Manager is the best online tool for your personal and team management.

However, the best recognition you can give is your undivided attention! Thus, online recognition should not replace personal attention and care for others.

In modern organisations, undivided personal attention is not possible for many reasons, including remote work, travel, distance, work location, and project execution.

This is where Practical Manager comes in handy. It provides ways to focus on personal and team goals, share attention, and maintain personal relationships within your team and with other teams, while ensuring thorough implementation.

If everyone in a team is capable and willing to do their best, organisations are more likely to survive and develop in the future. The following model is a framework for creating the winning teams.

You can read about the underlying model, the Will/Can, in the next section.

		Willingness	
		No	**Yes**
Capabilities	**Yes**	Motivated Supported Faced with demands	Gets responsibility, freedom of action, new challenges
	No	Transferred or Dismissed	Educated Tested Supported

Demands on employees in the Employeeship organisation

For all employees in a company to do their best and function as good "players in the team", it is necessary to specify what is expected of them, so they can use their inner capabilities to meet those expectations.

In principle, these demands and expectations should not be different from those that apply to "football players" and other "team players" on sports teams. Every employee should contribute actively to the company's success. To do so, it is necessary to specify the success criteria.

Similarly, the individual's contribution towards achieving success for the entire company, the team, and the individual must be determined.

Generally, it must be demanded and expected that every employee:

- helps to create a team spirit in the department and the company;
- works to grow both as a human being and professionally;
- is physically and mentally fit;
- both **can** and **will** fulfil his/her role in the department and the company.

The model below can be used to describe demands on employee **competence**. By competence is meant the sum of know-how, skills and attitudes.

Competence includes both **ability** and **willingness**. An employee can when he/she has the necessary proficiency and skills to do his/her work effectively. An employee shows **will** when they are willing to do their best for their own interest and the interest of the entire company. This means that the person is motivated, has self-esteem, and shows responsibility.

The "can/will" model includes four situations with the consequences they would have in an Employeeship company:

1. **Neither can nor will**
   The employee is transferred, dismissed or asked to find another job.
2. **Can but will not**
   The employee is motivated and given moral support, or is requested to change his/her attitude.
3. **Cannot but will**
   The employee is educated, trained and given the opportunity to test his/her competence with the necessary help and support.
4. **Both can and will**
   The employee is given responsibility, freedom of action, and new challenges, and is rewarded.

Demands on a team

Much of what a person has to do in life is done in cooperation, together with others, i.e., in a team. This is true at work, on a football field, and in a family. In other words, to accomplish something, you have to be able and willing to "play" with others.

To "be able" to play with others, you need "teamwork competence". Each player must:

- learn to understand the people they are to work with;
- know oneself and know the effect he/she has on the other members of the team;
- learn to function in a team that produces results without major conflicts and internal struggles;
- learn to focus energy on winning the real "struggle".

In a football team, willingness to cooperate is as important as the technical skills of the individual players.

Similarly, amongst managers and staff, it takes more than professional skills to achieve significant team performance. It takes both ability and willingness to fight and win together.

If a team is to achieve results, the right tools and equipment must be available. Furthermore, the employees must have the right attitude and necessary competence. Finally, responsibility and tasks must be allocated appropriately.

This may sound elementary and obvious. Nevertheless, it is difficult to achieve in practice.

This may be due to a lack of willingness and/or ability to understand the importance of teamwork in achieving the team's results.

A word 'partnership' means what it takes to be a good partner. Similarly, Employeeship describes what it takes to be a good employee. The following 11 factors characterise an Employeeship culture:

1. Commitment
2. Responsibility
3. Loyalty
4. Initiative
5. Productivity
6. Relationships
7. Quality
8. Professional Competence
9. Flexibility
10. Implementation
11. Energy

Practical Manager helps managers and employees to build and maintain an Employeeship culture in their teams:

- Help team members and team leaders to display 11 Employeeship values. You can customise and add your own company values and behaviours.
- It will assist all employees to establish behaviours which drive long-term results and focus on team and personal goals.
- Inspire engaging passion and commitment by recognising others for their work.
- Help team leaders assess their teams to achieve their full potential.
- Develop team members to their greatest potential
- Maintain quality relationships in the teams and with other teams.
- Create a true teamwork, »a team of teams« within your organisation.

The Practical Manager enables you to

- Track your personal and team *goals and milestones* to achieve results and employee performance.

- Give attention to the behaviour, performance or achievements of other members by *sharing recognition*.

- Manage your time so that you focus on what is important, i.e. your *Key Areas*, and create a bridge between your task decisions and time.

- Review weekly summaries of recognition for yourself or the team you lead, shown in your *Recognition account*.

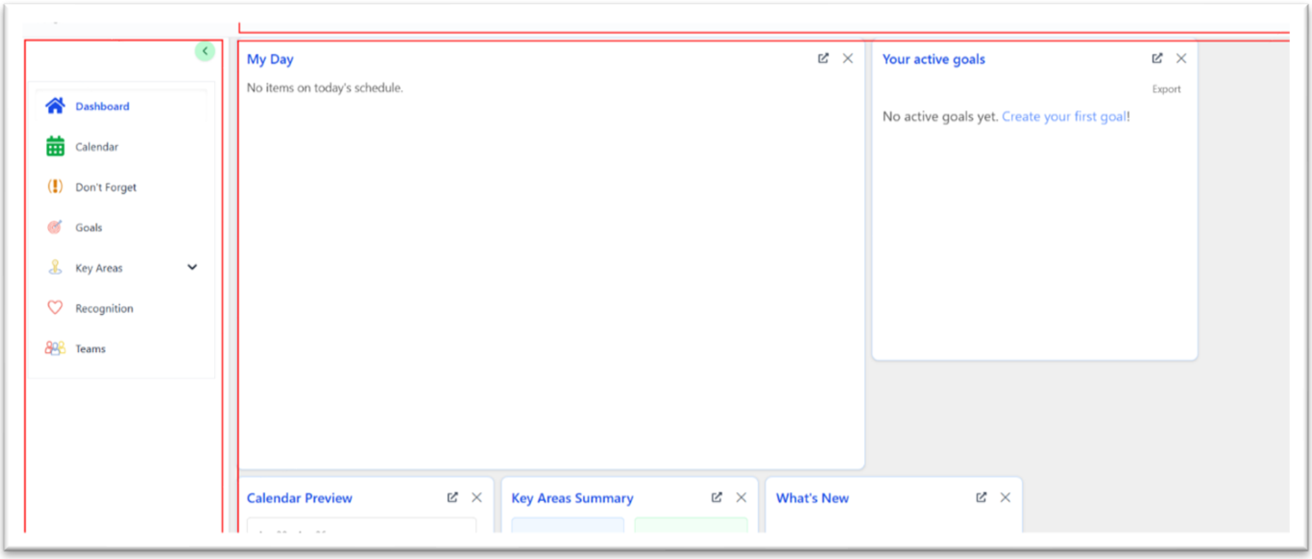
- Track three levels of reports showing capability and willingness to do the best for individuals, teams and your organisation in the *Teams* reports.

It also allows you to customise your "own" Employeeship culture and adjust the Practical Manager by defining your organisation's values and behaviours.

Practical Manager layout

The Practical Manager screen is divided into three areas:

1. The main menu area on the left side
2. Header menu area at the top
3. Canvas area in the middle, which takes most of the screen



The main menu area features the home icon and the main sections you can use:

- Home: brings up your Dashboard - the home screen
- Calendar: your time planning section with your agenda and calendar views
- Don't Forget!: your place to store unimportant but urgent small tasks or notes
- Goals: shows your goals and milestones section
- Key Areas: shows the list of your personal key areas with lists of tasks and activities
- Recognition: shows page with recognition features
- Teams & Members: shows reports for individuals/teams/the organisation

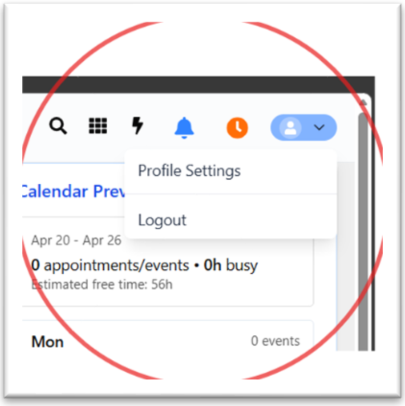
The header menu area is where section-related commands and options will appear.

The canvas area shows information and entry fields for working with Practical Manager.

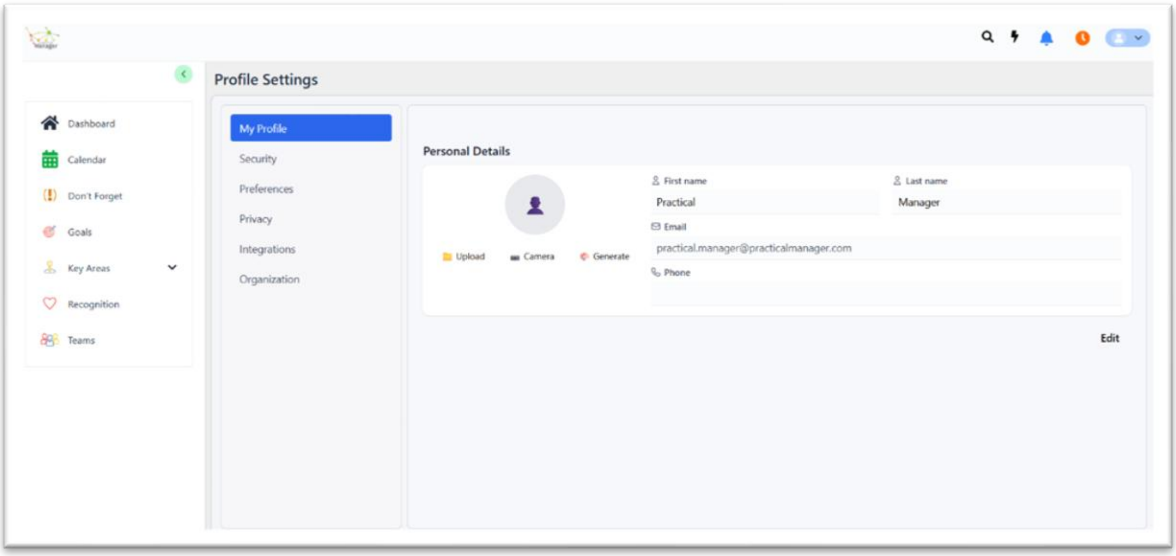
Setting up your Practical Manager

To get the greatest benefit in the shortest time, we suggest spending a few minutes and doing the following steps before you start using Practical Manager:

1. Complete your profile
2. Integrate with your Calendar and Task app
3. Enter your Key Areas
4. Enter your first Goal



1. Edit Profile



Fill out your short profile in the "Edit Profile" section that you can find in the top-right corner of the screen. It consists of:

- Your personal information and your organisation's basic information.
- The ***main team*** you belong to, and/or your additional teams you are part of.
- A simple list of your key areas (explained in a separate chapter).
- Your options for receiving notifications and reminders.

Enter your **first and last name and upload your image.**

Select a team you belong to, or, if no team is available to select, create your team by clicking the corresponding button.

Finito! You're done with setting up the basics.

Now, go on with the important stuff: your goals, key areas and tasks, and start using your personal planning and results tool.

2. Integrate with your Calendar and Task app

Integrate your workplace calendar and task system. By synchronising both apps, you will get an overview of your available calendar slots and items to work on. This will enable you to get control over your existing priorities.

Remember that working organisations have a tenant admin who needs to approve the Practical Manager app to connect with the tenant and exchange data. Talk to your IT department.

3. Enter your Key areas

The key areas highlight your main responsibilities for the tasks you oversee. They are important because they are what is required to accomplish your goals, they help maintain an overview and control, as well as identify what you should spend your time on.

They are important for your peers and members as well, because they help clarify the roles and responsibilities of everyone involved.

- You can enter no more than nine key areas. This helps keep the overview
  The number of your key areas is limited to keep your brain in control and have an overview of the tasks.
- **The key area of ideas** is predefined. Every person should generate and work with ideas to develop themselves and their organisation.

Read more about the Key Areas here.

About the key areas

A Key Area is a group of your tasks or projects that you are responsible for. The Key Areas describe areas of your responsibility at work (or even at home) required to achieve your goals. They are not necessarily always related directly to one of your goals, but most often, you will find out they are.

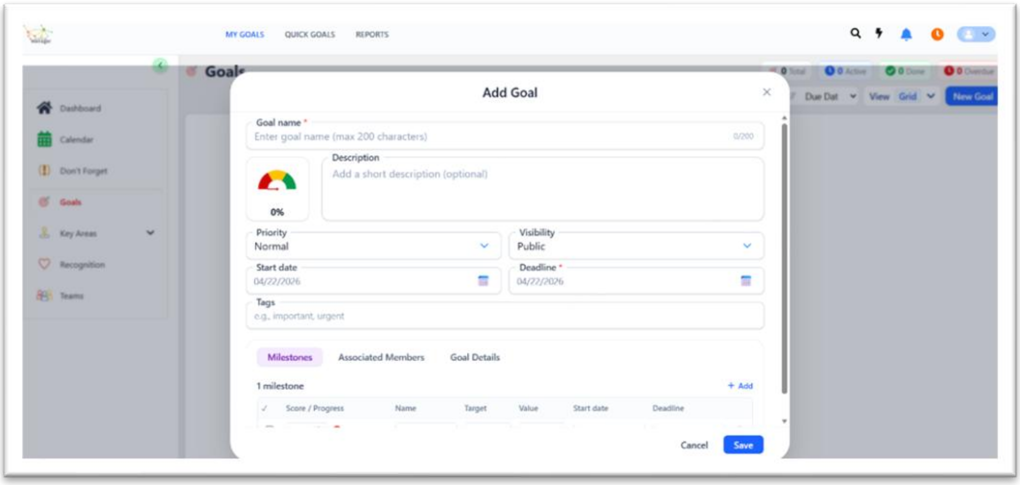
Using no more than 9 in total will help you maintain an overview and control of your work. Bright Ideas is a key area of everyone's focus, a responsibility that you should always work on and strive to make a reality in your future development.

You will better determine your key areas by answering the following questions:

- What am I doing?
- What are my tasks?
- What tasks would I like to have?
- What other tasks should I also be doing?
- What work is involved in performing these tasks?

You can read more about the Key Areas in the Personal Organisation booklet available upon request.

4. Enter your Goals



The goals section is your performance tool for achieving results and tracking progress. Goals are often referred to as Objectives and Key results, but we call them **Goals** and **Milestones**.

They may be personal, or you can enter goals or milestones for your entire team or the organisation. It is helpful to do so when you are a team manager, a project manager or a leader of an organisation.

- Goals are publicly visible by default. Mark a goal as Private for your family-related goals or company-sensible objectives.
- Select a team in the Goal Details section for assigning this goal as a team-level goal.

Using the Goals section

Start by entering your first goal you want to track and make sure to achieve, then click into the field provided.

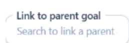
When you're done entering several goals, you will find them listed in a simple list. If you click any of the entered goals, that goal will be shown with related details: milestones, deadlines, and the score indicating your progress.

Milestones

Milestones are smaller parts of the overall goal. Their role is to quantify and define the overall goals or the steps required to achieve a goal.

A goal can only be added with at least one milestone – see the image above.

Link goals



A goal can be linked with another goal, creating a goal hierarchy. This is suitable if you have many goals to track, a project, or team goals that you are responsible for. You can have an overview of your goals in the *Quick Goals* view.

Score

The goal achievement score is automatically calculated from the progress scores for each milestone. They are primarily intended to help you score and record goal achievement progress.

You may want to decide whether a goal achievement score above 0.7 indicates exceeding expectations, 0.5 to 0.7 indicates meeting expectations, and below 0.5 indicates underperformance.

You can also use a different explanation that better fits your organisation.

Additional commands

In the header line, you will find three commands:

- Quick goals
- Share
- History

Quick goals will show a pop-up window with the goal hierarchy – an overview of your goals.

Share function enables you to create a goal report in PDF or Excel format, which you can print or e-mail to others. The report includes current goals and the goals you have achieved.

A history of goals can be created by archiving goals that are not relevant any more, but you would like to keep in your system.

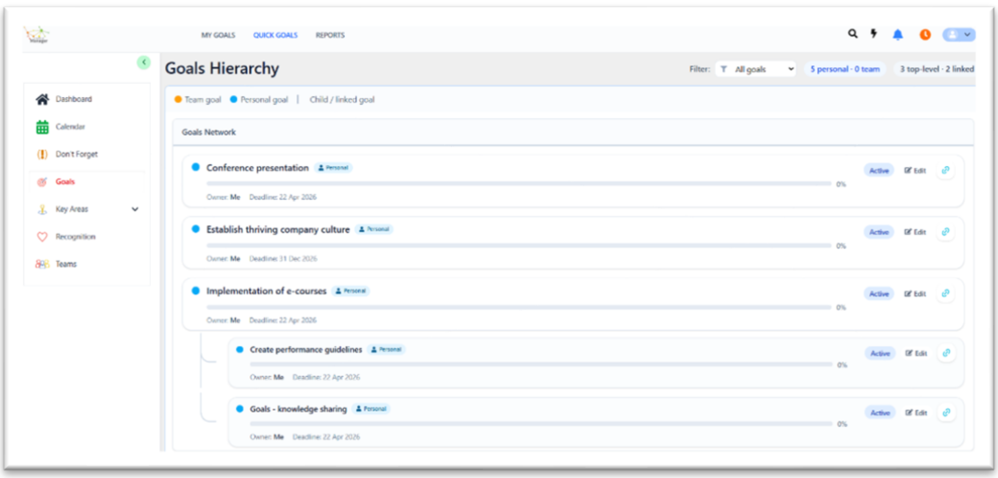
Read more about the goals

Goals are results you decide to pursue. A goal should be clear and concise, meaningful, realistic, challenging, and include a deadline. This tool allows you to describe your goals.

When you achieve your goals, mark them as complete so you can receive recognition for the accomplishment. Similarly, when your members accomplish their goals, make sure you share recognition – a genuine attention – with them.

We suggest you make sure the goals you enter in your profile have all of the above characteristics, including deadlines "no-later-than".

When you wish to keep a goal hidden from other members, e.g., your private life goals or special circumstances, you can lock it as private.



5. Invite your team members

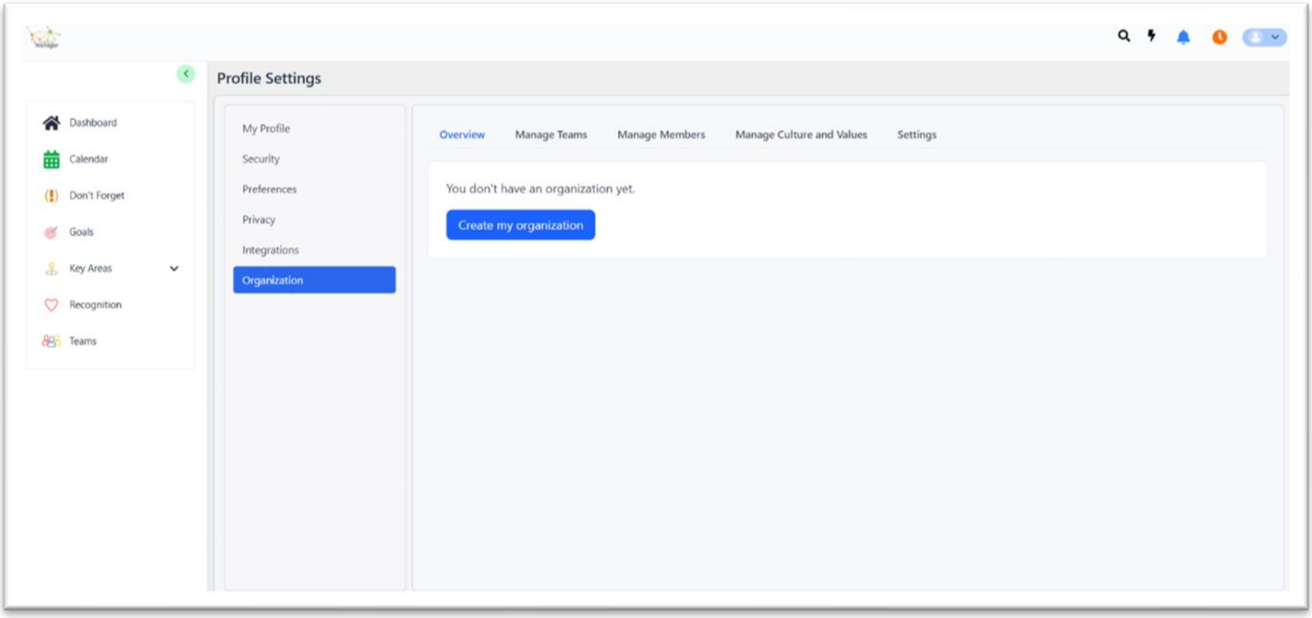
Use the tool as your team's productivity tool to greatly extend your personal results.

Practical Manager's goal functionality is fully realised when team members work together, share recognition and positive feedback, and keep their goals visible to achieve them and help each other achieve their shared goals.

This, altogether, helps them develop and maintain the Employeeship culture, where everyone is fully committed and aligned toward big, common goals or visions.

In the profile settings, create your organisation. Then, move to the Manage Members section and invite new members.

Enter the e-mail address of other members or copy and paste the unique URL into an e-mail, and send them the invitation link.



Your profile

Your profile includes the must-have options of your user profile. You will find it is divided into:

- Profile details
- Key areas
- Preferences

Profile details

You should add your profile image and make sure your name and last name are spelt correctly.

Key Areas

This page displays a list of your Key areas – the areas of your main responsibilities which are important for achieving your results. You can rename these labels, edit colours, or change their places by dragging them in different orders.

Please read further about the Key Areas here.

Preferences

The preferences allow you to make some further changes, such as:

- Manage calendar preferences, timezones, language settings, etc.
- Subscribe or unsubscribe to a monthly newsletter with productivity and related topics
- Enable or turn off reminders
  We suggest you leave reminders active, as this will help you remember useful personal habits, time planning, and Employeeship behaviours.

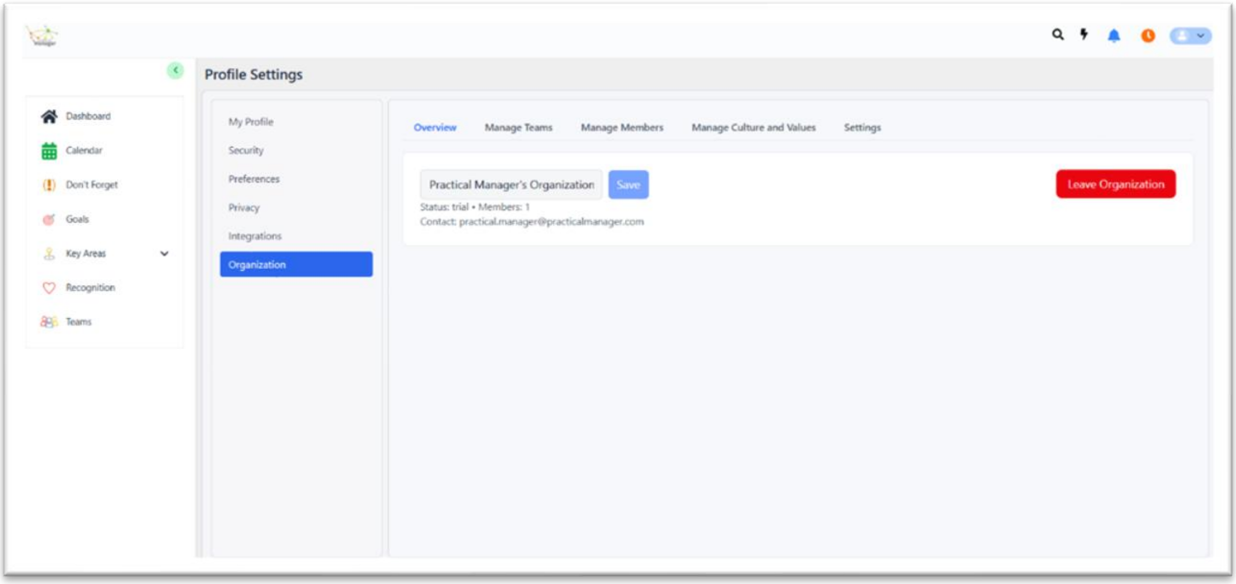
Note!

Reminders are part of "ring a bell" for your appointments, events, or tasks and activities! Be wary of polluting your mind with more sounds, pop-ups, or distractions.

Administrator settings

The first registered user of Practical Manager creates an organisation and becomes the administrator with the following additional features:

- Create teams and manage teams
- Manage members and assign admin or other roles
- Manage Culture and Values
- Company settings



Manage teams

Edit or delete any team in your organisation, or create a new team and define a team leader.

Manage members

Edit or delete any member in your organisation.

Managing Culture and Values

Use the values and behaviours described here, which are characteristic of organisations with an Employeeship culture. Research has shown that the 11 factors listed are typical of companies where employees act in the company's best interests. Learn more about Employeeship here.

If you wish, you can adapt the values and desired behaviors to align with your company's expected values.

You can also add your own icons and images for presentation purposes.

Account settings and preferences

- Define eNPS question e-mail frequency.
- Manage subscription settings
- Edit company information
- Name Business Segments for related goals.

Working with Practical Manager

There is no single definitive way to benefit most from the Practical Manager. You can adapt it to your working practices. Everyone will use it a little bit differently.

There are, however, a few basic ***soft*** rules and guidelines to follow so that you and other members in your organisation will have the best experience together. Achieving results is a “team matter” that requires people to work together and maintain good relationships. To ensure the satisfaction of all users, it is important that everyone complies with and agrees to these guidelines and basic rules. We call these prerequisites a »driving license« for the world of Practical Manager, and we suggest observing the following.

1. *Mind fellow members.*
   Members are real people who provide their real names and work in real organisations. As much as Practical Manager can help you bring out the best from people, it can deteriorate relationships with others if you misuse the tool by:
   - Giving double signals,
   - Praising online with Practical Manager and reprimanding or criticising in face-to-face relationships or meetings,
   - Making insincere, false or flattering compliments.

   Remember, whatever you do online is done by you, not by somebody else.

2. *Be nice.*
   Be considerate and inoffensive to others. When making comments or giving strokes, remain realistic and objective.

3. *Be professional.*
   Do not get too personal. Emotions are part of our lives. We believe that positive emotions drive results and the culture; therefore, be positive in what you do through Practical Manager and in line with personal relationships. Keep negative thoughts realistic and with positive intention. Remember, the person is OK.

4. *Respect other members' rights and respect your national and international laws.*
   Members' right is to feel OK and welcome. Only by staying within the law can you maintain Practical Manager service to run and contribute to your own success as well as everybody else's.

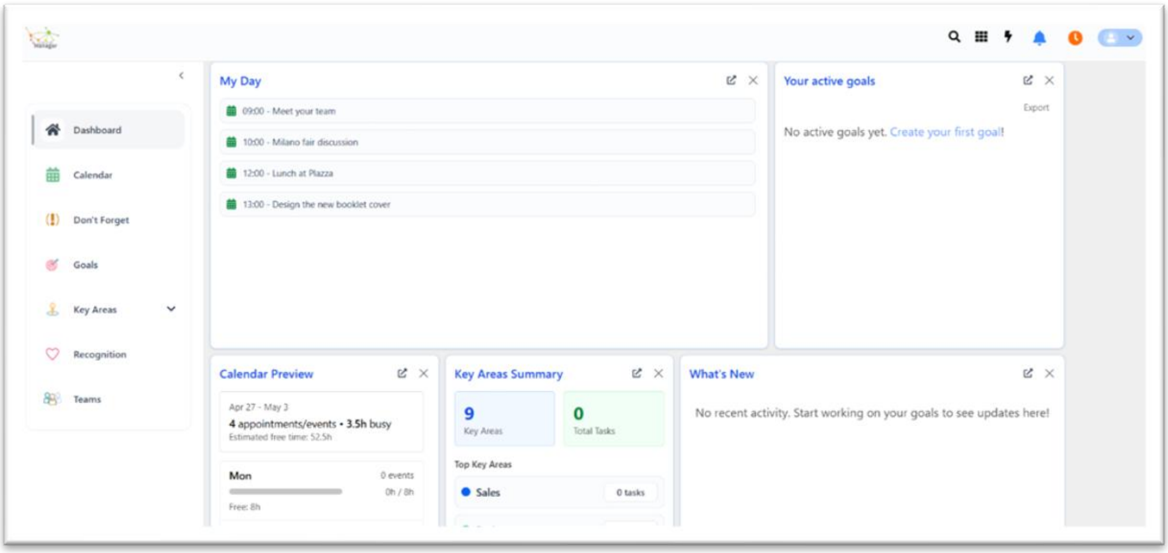
Start using the *Practical Manager* service with these basic soft guidelines in your mind. Here is a short, simple guide to the essentials of the service's technical guidelines to help you get started.

Dashboard

The dashboard presents your home screen, which displays several widgets for your personal focus and team:

- My Day: Your today's agenda – the most important view
- Goals: *"What is out of sight is out of mind". Review your goals regularly*
- Calendar Preview: What's on your schedule in the current week
- Key Areas summary: How busy your areas appear to be
- What's New: A list of things that happen 'around' your teams

Some widgets may be unavailable depending on your subscription type (e.g. eNPS score, etc.)



eNPS

Shows the "Employee Net Promoter Score" as a real-time indicator of all employees' experience in your organisation.

Active goals

This area displays a list of your active goals you're working on right now, and are always in front of your eyes.

What's new

This area shows all updates and news, anything that was delegated to you, about members of your organisation, including their achievements and performance, which is a reminder to send them recognition.

Employee Net Promoter Score (eNPS)

Companies can achieve customer loyalty when they have high employee loyalty. Engaged and committed employees who display Employeeship behaviour are the biggest asset of any organisation.

Their positive energy is contagious, and their responsibility extends far beyond formal responsibility for personal results. Their initiative is more than just ensuring the status quo; they're improving and innovating the company.

Their team spirit fights for the best interest of their company, and they are promoters of the company brand. Committed employees play a vital role in creating customer loyalty and company success.

eNPS is a quick, clear survey of your employees' experience to supplement information on the Employeeship culture.

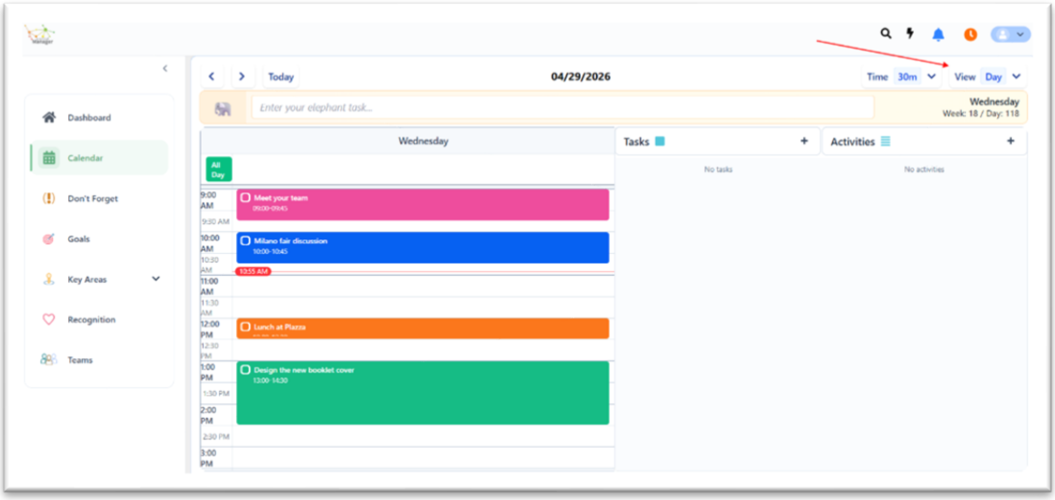
"On a scale of zero to ten, how likely is it you would recommend this company as a place to work?" is the central question to determine employee experience.

Employee Net Promoter Scores can be substantially lower or higher than customer scores. Employees often hold their company to lower or even higher standards than do customers. This is also the case for companies with different regional and cultural backgrounds. Read more about eNPS on the public internet.

The eNPS result is shown as a line chart and as an eNPS score on the dashboard tile. The eNPS details are part of the Teams section.

Administrators can see detailed scores for each team and download the score history as an Excel workbook with additional information across teams.

Calendar section



The calendar section is about your time plans.

Transfer appointments from your other diaries and calendars into this section by synchronising Outlook and Google in your profile preferences. This will display the daily schedule on your phone and bring your mobile items into the Practical Manager.

Use it as a normal diary for meetings and appointments.

To plan time effectively, it is necessary to work with different planning periods. This section has a selection of 4 views for different periods: *the quarter, the month, the week, and the day*.

Each planning period is treated differently. The longer the planning period, the more you should focus on overall matters. The shorter the planning period, the more you should focus on detail.

Immediately before each planning period, reserve time to ask yourself: *What* do you want to get out of the next period?

Ask yourself the following questions:

- What are my goals?
- Which are my most important tasks?
- Which are my "elephant" tasks? (Read more about elephant tasks)
- How much time is already booked?
- How much time do I have at my disposal?
- How should I spend my available time?

You will soon find that the time you spend planning pays off many times over.

Daily and weekly calendar views include a to-do pane with active tasks and activities – those which have been assigned either a start date or an end date. The to-do list helps you focus on what you need to spend your time on.

Bring them to the calendar by dragging or setting the time that you want reserved to accomplish them.

A task/activity that doesn't have either of the two dates assigned will not show in your calendar section.

The structure of the calendar section

The calendar section is intended to keep track of all appointments, meetings, trips, tasks, etc., which are currently planned.

Most people need both an overview and details in their current planning, and the ability to see several time periods at a glance. The Calendar section meets these needs. The calendar section is the planning tool that provides a complete overview of the month, week, and day.

The quarterly plan can provide the necessary long-term overview. The weekly and daily views can contain all the details you need in the short term.

The calendar section is organised so that you can work with all planning periods – the quarter, the month, the week and the day.

The quarterly planner is, in fact, a set of monthly plans; it shows the meetings, appointments, and tasks that have already been planned and that you need to take into consideration each month and week when planning the next week.

Every day when you need to make a plan for the next day, you can collect information from your weekly plan and/or your monthly plan.

You can work with all 4 views or only some. Depending on the situation, you can select the views that suit your particular purpose and the tasks you are working on.

It is, however, recommended to work with at least one long-term plan (quarterly or monthly) and at least one short-term view (weekly or daily), so you have both overview and details.

Quarterly planning

At the end of each quarter, set aside one day to make a plan for the next quarter. Create an overview of the available time – months, whole weeks. Decide which lengthy periods you wish to reserve for projects, major tasks, travelling, holidays, social life, etc. Decide whether you wish to set up a fixed work pattern for doing certain things at certain times.

This view will show you at a glance all the forward commitments for the quarter and the month, such as meetings, travel, holidays, anniversaries, periods reserved for special commitments, projects, etc. They provide an overview of the days already booked and make it easy for you to see the extent and composition of your available time and to coordinate your key areas with your annual time use.

This view shows all-day events, and further details for a day are available through the indicator. Switch to the monthly view to see the details for each day.

How to use the quarterly view

Most people realise how useful monthly, weekly, and daily planning is. You also need a facility for long-term planning, such as a quarter. Making New Year's resolutions is not enough. The Quarter view provides an overview of the year's major tasks and events.

Monthly planning

At the end of each month, set aside 1-2 hours to plan the next month. Create an overview of the remaining time – weekdays, weekends, evenings. Decide how to spend the available time and reserve time for your major tasks. Prepare the month's activities: reservations, meetings, invitations, messages, information gathering, learning and development, shopping, etc.

The monthly view is your diary for making notes of appointments and meetings. It is your *appointment book*.

The monthly view is designed to track current meetings, journeys, commitments, and fixed appointments. It is not intended to contain a mass of detail about tasks and activities, which would impair the overview. Such details belong on weekly and daily views. All details, such as venue information, participants, and the agenda, should be stored in activities and tasks within the key areas section.

How to use the monthly view

Get used to writing appointments into your monthly planner immediately. Then you will not forget them or double-book appointments.

When you plan next month and know how much time you have available, you can pull tasks from your key areas and reserve time for them.

Also, go through your schedules for recurring tasks, birthdays, and anniversaries, and check them in the monthly view – for example, enter a symbol or a reference to a name, and add activities. Do this every month or so.

Enter the elephant task(s) of the month, both private and work-related. Set time aside for these elephants. Also allocate time for other things you want to do during the month, e.g. "meeting with myself" (see section "Good advice"), reading, preparation, time for family and friends. Include evenings and weekends in your plans.

Hints and ideas:

- Use abbreviations, keywords, and symbols
- Indicate the estimated length of appointments
- If you have many appointments on one day, you can fill in a daily plan for the whole day to indicate that on the monthly planner and write a separate plan for this day in the description.

Weekly planning

Every week, set aside 10-15 minutes for planning the next week. Find out how you wish to spend your available time – mornings, afternoons, evenings, hours. Decide what you wish to get done during the week and reserve time for meetings and tasks. Prepare the tasks of the week: make detailed programmes, plan shopping and bookings, check appointments, equipment, materials, etc.

The weekly view includes details for meetings, appointments and tasks of the week, unlike the monthly view, which is mainly meant to show appointments, etc., planned well in advance. The weekly plan links to the long-term planning with the specific details in the daily plan.

This view contains a weekly overview with a daily plan for each day of the week. It can be used for appointments and weekly tasks and can occasionally replace daily plans. You can even disregard the daily view with hours and use this view for weekday notes and checklists.

How to use the weekly view

At the end of the week, your monthly view will show what has already been arranged for the next week.

Based on your overview of the week's available time, you can now plan what you wish to get out of the week, in addition to the appointments and tasks already planned. Collect data from your key areas and schedules, and check your Don't forget section.

Remember to enter the elephant task(s) of the week (see section Elephant tasks) and reserve your "elephant time".

Make it a habit to consider every week how to make your mornings, evenings, and weekends more worthwhile.

Daily planning

Every day, take stock of what you have done and spend just 5-10 minutes making a detailed plan for the next day. Decide how to use your available time tomorrow. Prepare the day in detail. Get everything ready: papers, tickets, keys, clothes, etc. Decide what to say, do and achieve.

Drag and drop tasks and activities that you want to book time for from the right-hand side onto your daily calendar.

Enter appointments and commitments at the appropriate time on the left-hand side. The right-hand side serves as a structured "to-do" list for those things that you believe you can manage in the time not already committed.

The day as a planning period

The days are the most important of all planning periods. Day planning determines whether your plans are translated into reality. Daily planning is a question of definite action "right here and now", not just thinking about goals or good intentions. In other words, the only job you can do anything about is the one you decide to do something about today. The day is vitally important because the overall result at the end of the year is the sum of the results of each day.

Make tomorrow's daily plan before you finish your work today.

This is probably the best advice you will ever receive.

By keeping a close eye on immediate details and not allowing too many loose ends to accumulate, you will gain several advantages.

- You will have a feeling of overview and control, which will boost your energy and performance. This, in turn, will lead to more enjoyable evenings, greater energy, a better social life, etc.
- With a clear awareness of the tasks and problems of tomorrow, you can put your subconscious brain to work. It will start to produce ideas and solutions – even while you sleep. You will arrive at work the next day with your mind prepared and with a store of ideas and possible solutions.
- With clearly defined plans for the time of day at which the events will take place, it is easier to avoid being sidetracked. You will also find it easier to work off interruptions. In fact, you will find you use your daily capacity – the hours and the minutes – much more efficiently. The fact that you have prepared and planned all your tasks enables you to accomplish the results needed to achieve your goals. Your colleagues will find it easier to communicate with you and coordinate their time with yours. This strengthens your self-esteem and reduces stress.

All these advantages are self-evident for daily planning. However, most of them also apply to the planning of all other periods.

The day is the most important of all planning periods. *If you are not in control of your day, you are not in control at all.*

The daily plan is meant to keep track of your day and provide an overview of your daily activities, however large or small. It helps you use every hour and every minute effectively.

How to use your daily view

At the end of each day, finalise a daily plan for the next day. This will make you feel more relaxed and give you a better start the next day.

Daily planning is best done in 3 steps:

1. *Check your booked time*
   Verify that all appointments and commitments are current and correctly inserted. Add anything relevant from your monthly view to the left-hand side of the daily plan.
2. *Get an overview of your available time*
   Mark an estimate of your booked time by editing the appointment details as you expect them to be required. This allows you to see the extent and composition of your available time. Be realistic in your estimate of the time you need. Allow some extra time as a "buffer".
3. *Make good use of your available time*
   Looking at the available time, realistically consider how many major and/or minor tasks you can fit into the day and when to do them. Transfer tasks and activities from the Key Areas section and the Don't forget section to the daily plan's to-do list. Any unfinished tasks can be transferred from the previous daily or weekly plan.

Red and green times

Arrange for your own "red" times when you should not be interrupted. Also, arrange for "green" times each day when you will be available and can be contacted. Make sure that people know when these times are.

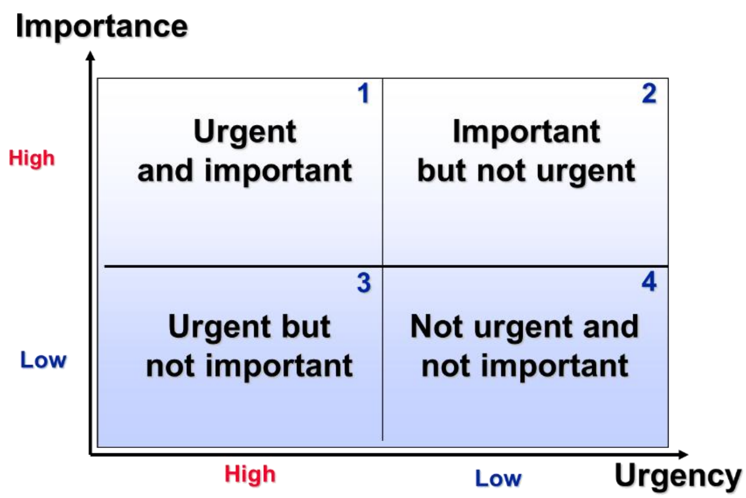
Prioritizing

Most of us would know people who spend their entire day in crisis mode. Every task is both urgent and important. They are unable to prioritise because it all needed to be done yesterday! We call this fire-fighting because they spend their whole day constantly putting out spot fires.

Urgent and Important?

We can break our tasks into different priorities using the criteria of importance and urgency. Is a job important or not important, urgent or not urgent? Using the following model, you can place your tasks in one of the four quadrants. Using this, you can easily create an overview of what we actually need to be spending our time on to achieve our goals. From a time management perspective, the overall goal is to maximise time spent on items in the top two quadrants and minimise time spent on items in the bottom two quadrants.

The Important/Urgent model was first developed by Alan Lakein and later adapted by Stephen Covey.



Avoiding firefighting

To avoid firefighting or crisis-management behaviour, it is vital that you allocate some time every day or every week to important but non-urgent tasks. In October, end-of-year budgets might be quite important, but they are definitely not urgent. However, in December, if they are not completed, they are not only important, they are so urgent that they have become a crisis.

Anything in the top right quadrant that is not achieved will sooner or later make its way into the top left quadrant, and then you are in fire-fighting mode!

Use three levels of priority: **High / Normal / Low**

By using these priority levels, you can group your tasks on your daily task pad into the different quadrants.

Quadrant 1 - High - Important and Urgent

Quadrant 2 - Normal - Important but not Urgent

Quadrant 3 - Urgent but not Important

Quadrant 4 - Low priority. We suggest that you avoid Quadrant 4 tasks, use them only as notes for tasks that are irrelevant for now, or reassess them.

If you do have to do them, they must be either important or urgent to someone.

How to use quadrants in the Practical Manager

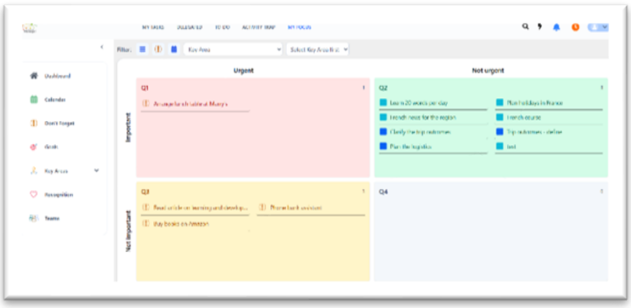
You can follow your tasks in the four quadrants in "My Focus" view of the Key Areas

Q1: Key Area and Don't Forget! items with missed deadlines and due dates and/or marked with high priority.

Q2: Key Area items with normal priority and within current deadlines and due dates

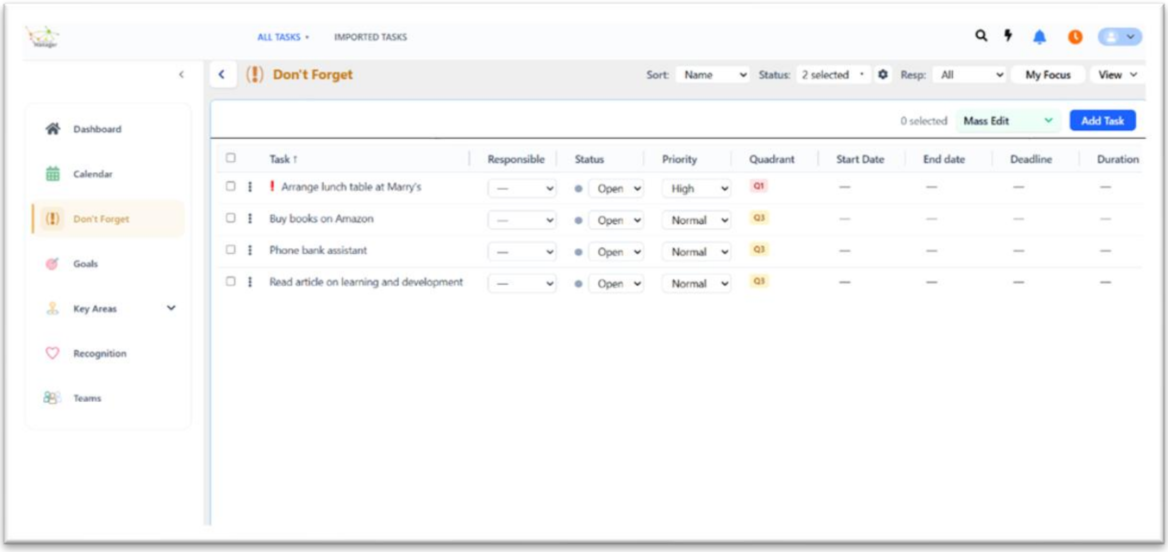
Q3: Don't Forget! items with normal priority and within current deadlines and due dates.

Q4: Key Area and Don't Forget! Items that are within deadlines and have a low priority.



This view will help you determine how you use your time and refocus to gain balance and control to finish your elephant tasks and achieve your objectives.

Don't Forget! section



The Don't Forget section is for the smaller tasks you must remember to do, but that are not part of major tasks or projects in your key areas. Sooner or later, they get urgent.

Don't forget division is for small one-off tasks,

- Which do not take much time
- Which do not need follow-up
- Which require little energy
- Which can be done any time

Examples of minor one-off tasks: *reading an article, making an appointment with the dentist, tidying up a cabinet, ringing for training course prospects, returning a book, sending a thank you letter*.

> ***Important!***
>
> *The more of these you have, the more difficult it is to set priorities. You run a greater risk of getting sidetracked and controlled by the sequence of events.*

You will be more organised if you use your *Don't forget* instead of loose paper scraps.

How to use the *Don't forget* section

Get used to making a note of minor tasks in the Don't forget section instead of sending yourself an e-mail message - as soon as they occur. It saves you from trying to remember them.

Do your minor tasks:

- ***When gaps occur in your day***, i.e. short intervals which cannot be otherwise occupied.
- ***When your energy is low***, i.e. when you do not feel able to start a new, major task.
- ***When the risk of being interrupted is high***. When it is difficult to continue working undisturbed.

You will be able to get minor tasks done without losing track of the overall goals and without breaking up the periods when you concentrate on your major, important tasks.

Go through your Don't forget section regularly. If a minor task is becoming urgent, add it to the daily plan by entering a start date.

If a minor task has to be done on a specific day, transfer it to the tasks section of the daily calendar by adding a start date.

Sequence of tasks

The sequence in which people do their various tasks has a major impact on the quantity and quality of their achievements.

It is tempting to start the day by doing a few minor tasks – "to get them out of the way" or to "warm up". But doing so can easily break an otherwise uninterrupted period of time. This breaks the day down so that only minor tasks get done.

Approach your tasks from the other end. Whenever possible, take the major, demanding tasks first and fit the small tasks into "the gaps": after you finish a major task, before you start a new major task, before you go to lunch or right after you are back, etc.

You can only do this if the minor tasks are easy to find and not mixed up with lots of other tasks – or even e-mails.

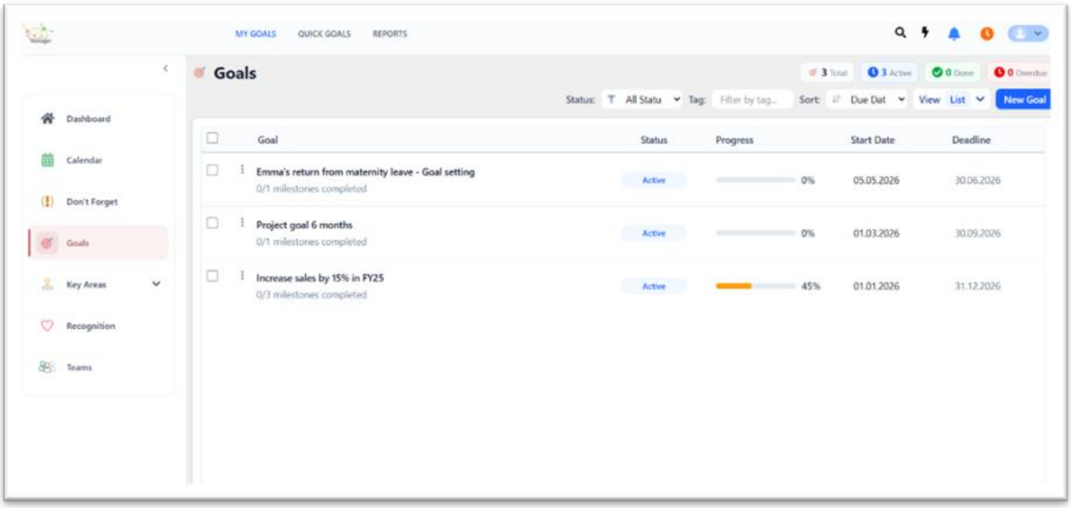
Goals section

For life to have meaning, it is important to set goals and achieve them. However, it is not just a question of reaching goals, but of enjoying the journey to them.

Goals in a company or a team also create meaning. They also align everyone's efforts in the same direction. Therefore, goals help explain roles in the company and drive the performance of the individuals and teams.

A goal is a desired result. A goal is a clear description of a situation you want to be in when you have carried out certain actions.

"Increasing sales" is not a goal, because it does not describe a condition or a situation you wish to achieve. "To have achieved a 20 per cent increase on last year's sales turnover by December 15^{th}" is a better definition. Similarly, "being able to wear my party clothes" or "weighing 11 stone by the 1^{st} April next year" is better than "losing weight".



1 - State your goal here
2 – Enter Start and End dates
3 - Add an optional description of your goal/notes
4 - Add at least one milestone with its start and finish dates
5 - As you work on the tasks to reach your goals, increase the progress indicator accordingly or change the Scores for milestones.

- Tick the green arrow next to the goal deadline when finished.
- You can review finished goals in your goal ***History***.
- Link smaller goals to larger goals if appropriate for you to create an overview and control with the ***Quick goals*** feature.

Guidelines for goal-setting

You are more likely to achieve your goals if they fulfil the following conditions:

- *A goal should be clearly defined*
  A goal should describe the situation you desire as clearly and as specifically as possible.
- *A goal should be realistic*
  It should be both possible and probable to achieve the goals.
- *A goal should be challenging*
  You should make an extra effort to reach your goal. You should do your best.
- *A goal should have a time limit*
  Otherwise, you might easily be tempted to postpone the tasks that lead towards your goals.
- *A goal should be worthwhile*
  Achieving a goal should be important to you. It should have a high priority.

Important!

Mark your goal "Private" only if you think it should not be shared with your team members; otherwise, default to "Open" and share goals with others. This allows everyone to work toward the same shared goals.

Go to another person's profile to see their active goals and understand what they strive for and invest their efforts in. Create a culture of "we team", where you all play with the same ball.

You should have both small and large goals. Short-term and long-term goals.

You should get into the habit of continually setting goals for different periods: the day, the week, the month, the year.

Your goals will constantly change depending on your experience, age, and company role. This is why you should adjust your long-term goals at least once a year.

Make it a personal habit to set and achieve your goals. If you don't write down goals, it's most likely that you will forget about them and fail to focus on things that matter to achieve them.

Goal setting in a team

Make it a team habit to set up monthly individual performance reviews with each team member who reports to you.

1. Review the past term (monthly/quarterly) goals and score them.
2. Ask the employee to set up next term (month/quarter) goals, and present them.
3. Discuss how you (as a manager) can help the employee reach the desired goals, and how you can remain most helpful to your team members.

At the end of each month, book 20 minutes for individual member performance meetings.

At the end of each quarter, book 30 minutes for individual member quarterly performance meetings.

During these meetings, share the Practical Manager goals on screen, or use a printed version you can create with the ***Share*** feature.

Use of Key Areas

The Christmas Tree

Claus Møller pioneered the time management and results philosophy, which is integrated into the Practical Manager, focusing on desired results and what it takes to actually achieve them, thus moving from idea to action. To create results, you need three things:

1. Know your goals
   You can only reach your goals if they are absolutely clear to you and you are constantly reminded of them.
2. Determine your tasks
   To reach your goals, you need to determine which tasks to complete. You need your decision base for how to use your time.
3. Spend your time on these tasks
   You need to create a bridge between what you decided to spend your time on and the time available for implementing your decision; that is, perform your tasks.
   Use your available time to do "the right things", the things that lead to results.

Know your goals

Most people have more goals and wishes than they can fulfil. It is necessary to set priorities and decide which goals are most important and which can wait. Refer to the description of the Goals section here.

Determine your tasks

Every person needs an overview, structure, and a sense of being in control. This is necessary for maintaining personal efficiency, achievement drive, and high energy, as well as for avoiding stress and frustration. Overview and control of the tasks enable you to use your brain capacity fully.

Use Claus Møller's Christmas Tree concept for achieving an overview and control of the tasks in your decision base. Attach all the small pine needles (small activities to be done) onto twigs (bigger tasks and "elephant tasks"), which grow on the branches (your main areas of responsibility).

We introduced four levels to help create an overview:

Trunk:

The overall goals for your life at work and at home.

Branches:

Your key areas. The main areas in which you should focus your efforts to reach your goals – the areas in which you want to achieve results.

Twigs:

The major tasks to be executed within each of the key areas. These are the details of each key area.

Pine needles:

The practical activities, to-dos, minor items, and the details that are necessary to complete your major tasks.

The Elephant Technique

Another of Claus Møller's techniques for handling very large tasks, i.e., elephant tasks.

Examples of Elephant tasks are developing a new product, learning a language, learning a programming or other skill, losing weight, getting fit, writing a book.

These tasks are overwhelming; progress is difficult to see; there are no immediate consequences; and they are often postponed.

These tasks are too big to accomplish them or "swallow" in one day. That is why many people postpone them for a while – to wait until a better time, or until their mouth has grown. It never happens!

How to eat an elephant?

The only way to eat an elephant is by dividing them into "bite-sized" pieces.

- Divide the elephant into "bite-size" pieces.
- Schedule regular "bites of the elephant" as "task of the day", "task of the week" or "task of the month".
- Make sure you "eat" a bite every day in addition to completing your other routine tasks.

Make sure you finish the elephant. Thus, focus on no more than 1 or 2 elephant tasks at a time.

The elephant tasks are built into your calendar section of Practical Manager.

Learning French with the elephant technique

If you want to learn French, don't worry about the entire task (the elephant) at once. Instead, make sure you eat a small "French elephant hamburger" every day.

In other words: It is not a question of learning French next year – but of learning 10 French words every day. That will be 3,650 words in a year, which is equivalent to the basic vocabulary.

Become a development person

There are two kinds of people: the "maintenance" person who works to preserve the status quo, and the "development" person who proactively applies the elephant technique to drive development and change.

Are you a "maintenance" person?
A "maintenance" person:

- Uses all their time just to get by.
- Does not schedule any time for development projects.
- Works to maintain the status quo, avoids problems and criticism and solves problems in the short term.
- Is controlled by external influences: telephone calls, mail, interruptions and sudden whims.

Be a "development" person
A development person:

- Manages current tasks.
- Always reserves some time for development projects.
- Completes a small part of an elephant task every day.
- Is guided by the goals they have set for the future.
- Has sufficient self-discipline to postpone a short-term pleasure for the sake of major, more long-term goals.

The Key Areas

Key areas are the main categories of tasks you need to focus on to reach your overall goals, both at home and at work. The key area form is a "table of contents" for your key areas division.

Determine your key areas using the following procedure:

1. *Are you a manager/supervisor?*
   Possible Key areas would include: Staff. Staff/organisation. Staff relations/effectiveness; e.g., Sales force, sales force relations/effectiveness, etc.
2. *Do you have financial responsibilities?*
   Possible Key areas would include: Finance. Finance/administration. Costs. Profitability. Budget/follow-up. Prices (e.g. production costs, sales prices, etc.)
3. *Do you have administrative responsibilities?*
   Possible Key areas would include: Administration. Administrative tasks/responsibilities/routines; e.g. personnel administration, salaries, maintenance, buildings, machinery, administrative systems, procedures, etc.
4. *Are you responsible for projects/major one-off tasks?*
   Possible Key areas include: projects, customer tasks, development projects, stakeholder tasks, sales campaigns, marketing projects, and employee tasks such as selection and onboarding.
5. *Do you have internal communication and coordination responsibilities?*
   Possible Key areas would include: Internal relations. Internal communication/co-ordination. Relations: manager/colleagues; e.g. board, management team, branches/divisions/subsidiary/parent company/panels/committees.
6. *Do I have external communication and coordination responsibilities?*
   External relations, external communication, e.g. customers, suppliers, business associations, dealers, authorities, organisations, institutions, panels, committees.
7. *Are you responsible for development, improvements, and new methods?*
   Possible Key areas would include: product development, technical development, method development, market development, organisational development, and systems development.
8. *Are you responsible for long-range planning?*
   Possible Key areas would include: Strategic planning, future/development/ideas. Strategies.
9. *Do you have any special functions or fields of interest? Locations/offices?*
   Possible Key areas would include: Special fields of interest, position of trust, directorships, politics, associations, interest groups, training, freelance work, etc.
10. *Is professional development particularly important for you?*
    Possible Key areas would include: professional updating, state relevant type.

Reserve at least 1 or 2 key areas for "Personal Development", Family and friends", Personal finances", "Home", "Hobbies" or other key areas related to your private life.

Give recognition - help people to do their best

Having good personal relations means feeling good about yourself and getting along with others. The individual's efforts towards good relations determine the psychological environment in the department and the company.

In an Employeeship company, all employees assume responsibility for the department's and the company's internal and external relations. All employees make a wholehearted and goal-directed effort to create a climate in which everyone finds inspiration and wants to do their best.

In Claus Møller's books:" *My Life Tree – a different book about personal development"," Be a Double Bagger – bring out the best in yourself and others", and" Heart Work – bring your heart to work",* you will find inspiration, methods and tools to get on well with yourself and others.

People's self-esteem determines whether they feel good about themselves and get along with other people.

Your self-esteem is determined by the amount of recognition your brain registers.

Recognition – in its broadest sense – is also called strokes. Strokes are vitally important to the quality of the psychological environment.

Strokes can be defined as: *"Any kind of attention people can show".*

Strokes are the most powerful means we human beings have at our disposal for developing or destroying our own self-esteem or that of others. It is essential to your well-being that you receive strokes. If you do not receive enough strokes or recognition, you will feel bad about yourself, you will behave inappropriately, become a loser, or, in the worst case, become seriously ill, both mentally and physically.

The way in which you exchange recognition with others determines what kind of relationships you have. Strokes can be positive or negative. Your self-esteem is determined by the amount of positive and negative strokes that you receive.

Positive strokes

Positive strokes increase your self-esteem and make you happy. Positive strokes may include any form of recognition, attention, praise, appreciation, pleasure, pride, or admiration.

Negative strokes

Negative strokes make you upset and disappointed, and make you feel inadequate.

Negative strokes may take the form of criticism, reprimands, scorn, ridicule, distrust, and ingratitude.

Zero strokes

The best thing a person can receive is positive strokes. The worst thing a person can receive is not negative recognition, but zero recognition – “indifference”. Nothing has a more destructive effect on someone's self-esteem and sense of well-being. Lack of strokes has a dramatic effect on people's thoughts, feelings and behaviour.

When people don't get enough positive strokes, they try, consciously or subconsciously, to get negative strokes. This reaction is natural because, despite everything, negative strokes are better than no strokes at all.

Conflicts at work and at home, high personnel turnover, high absenteeism, lack of commitment and poor quality are often a direct result of a lack of attention.

Make the following exercise

Sit down in a chair and relax. Close your eyes. Think about your experiences last week. What happened? Who did you spend time with? What did you talk about? How did you feel about yourself? How did you get along with other people?

Did you help create a positive environment that encourages you and others to develop?

Do this mental experiment for each of the people you have spent time with and with whom you currently live and work: your partner, your children, your parents, your colleagues, your boss. Think about them one at a time and ask yourself the following questions:

- How many times did I give him/her positive recognition? In what situations? For what? How did I do it? Were they superficial or profound?
- How many times did I give him/her negative recognition? In what situations? For what? How did I do it? Did he/she maintain their self-esteem and perceive the recognition as a help?
- What kind of recognition did I give most often last week – positive or negative? Does he or she receive mostly positive recognition from me? Does he or she receive mostly negative recognition from me?
- Did he/she do something last week which I didn't appreciate at all? Did I invest any time in this person and show my interest in them? Do I take his/her efforts for granted? Did I make any attempts to open the door to the other person's world?

Then ask yourself the following questions about the recognition you received during the past week:

- How many positive recognitions did I receive? From my partner? My children? My staff? My colleagues? My boss? My friends?
- How many negative recognitions did I receive? From my partner? My children? My staff? My colleagues? My boss? My friends?
- How many times did I make a serious effort without anybody noticing it?
- How many times did I do something for others, which they took for granted? Who is interested in my world?

How do you feel right now? What do you feel?

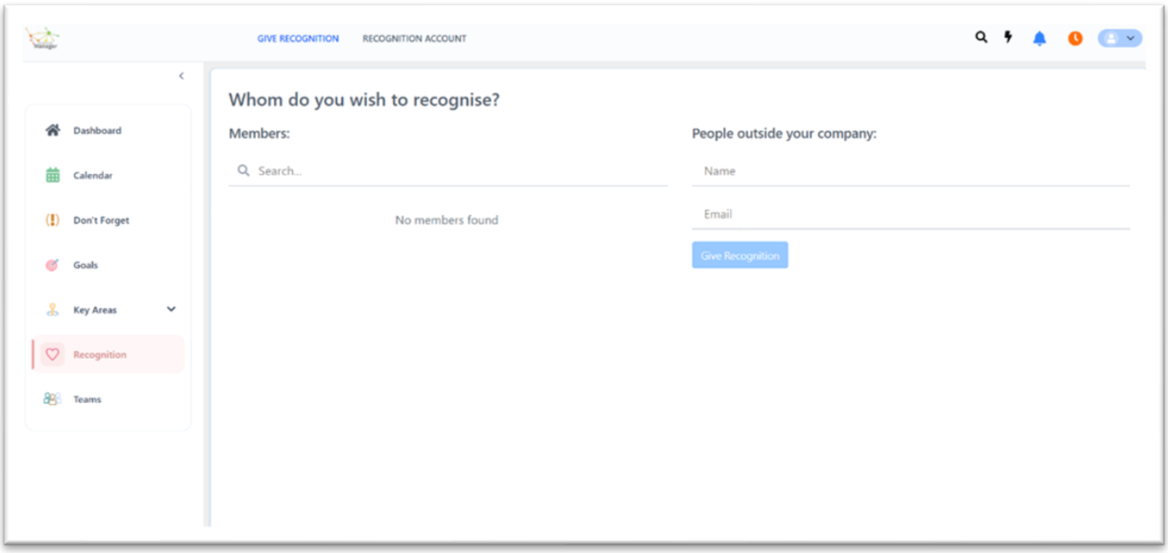
- *Do you give enough recognition?*
- *Do you receive enough recognition?*
- *Is recognition something you need to work with?*

If you do, you will feel better about yourself. You will make more friends and have better relations by giving more positive recognition.

Giving recognition in the Practical Manager

Click the Recognition section in the main menu, indicated by a heart icon.

Tip: "You must **<u>use a real person name and surname</u>**. Do not pretend to be somebody or something else, as you like to stroke real people. Remember, strokes are basis for relationships, which are the most important part of ones life. They are also the most important part of business since you can only do business and succeed in doing business when having good relationships with people that matter most – your employees and colleagues."



This is the section where you give strokes to other people. Giving somebody recognition means showing positive attention for their behaviour, performance, or recent achievements.

Helping people do their best means catching people doing things right and sharing recognition with them. Focus on success by recognising your team members for doing a good job in the following three areas: values/behaviour, performance in one of their key areas, or goals/achievements.

1. Select a team member from your organisation or enter the name and email of another person on the right-hand side
2. Select an area, e-g, Employeeship / Performance / Achievement
3. Select the icon as required and add a personal note

Be specific! Remember to ***enter a short note for the person*** receiving the stroke. Only then can you submit your recognition card. The note or comment is the message you want to share with your friend and fellow team member.

Recognition Account

When a person receives a recognition card, it is recorded in the *Recognition account*.

Members receive a weekly summary report highlighting their achievements and the recognition they receive. This is where you can see what your team members noticed and welcomed.

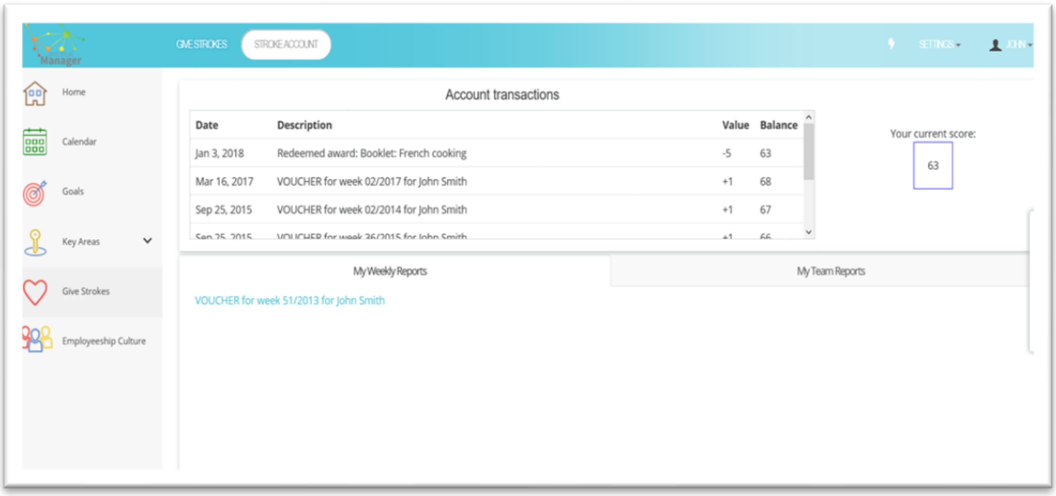
A team member and the team manager will see this information and must confirm it before it gets added to the stroke account.

Knowing the recognition you receive from others increases happiness and will make you more self-aware – and it also keeps updates on achievements and behaviour of your staff members visible.

Weekly recognition reports are a personal summary of what has happened and are emailed to each member. They are available for you to review yours under **My weekly reports**.

The number of recognitions is added to your Account balance score, which is your account of recognitions awarded for your Employeeship behaviour, performance in your key areas, or goal/milestone achievements.

Recognition that a member receives is added to the profile score. Recognition that a member sends to other members also counts towards the profile: “A recognition given is recognition received.” Both people benefit from having good relations.



Teams section

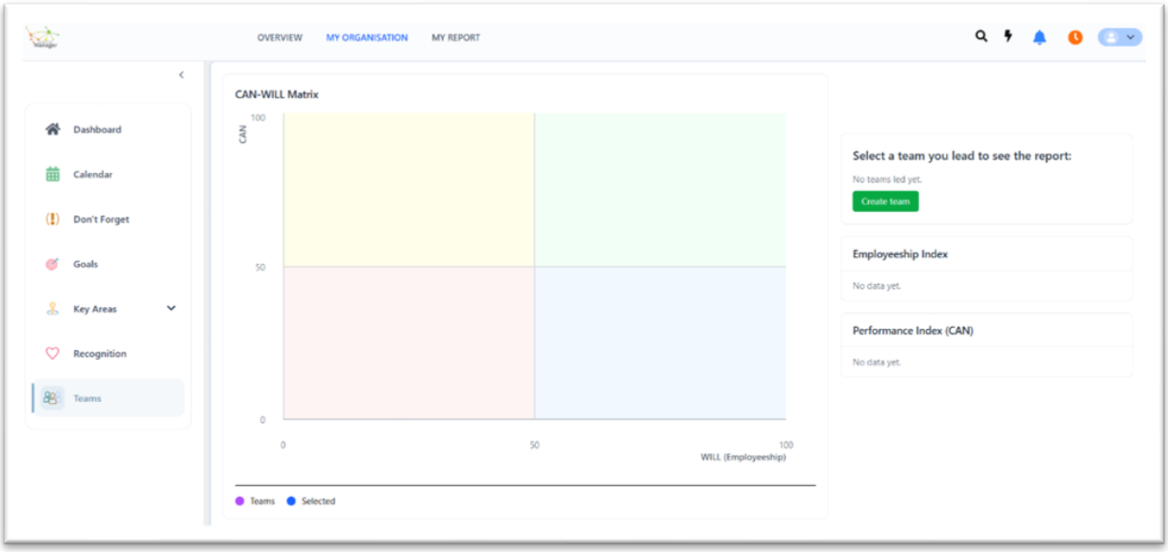
The Teams section shows your organisation's teams and members and provides reports on the Employeeship culture status.

It is of great value for your team development and your personal development as well. It is showing the organisational recognition balance, called Employeeship Index, in real-time and an adjusted Will-Can model.

This model shows the teams in your organisation doing their best on the ability and willingness sides, as perceived by company users in real time.

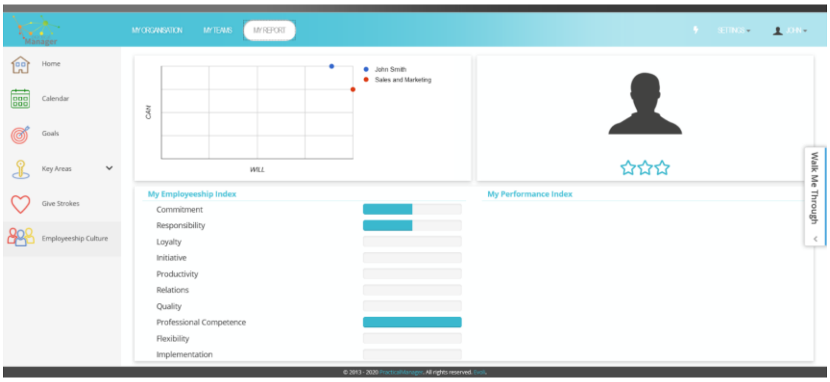
- Every team member can see his or her own results and the team results
- Every team member can see the results of other teams' total results
- Every team leader can see the status of his/her teams and his/her team members

At any time, you can take a look at your own "recognitions" or those for one of your teams, which are snapshots of a team's situation.



In the My Report subsection, you will find your Employeeship status made from the summary of the recognition you received for Employeeship, Key areas and Achievements. This is your personal Employeeship meter in real-time.

You cannot see any data from the other team members. However, the overall scores for your team are displayed, which gives you an idea of your personal development goal and some motivation to improve.



You can see a report for all teams you manage in [My organisation](). It will show information about the teams in your organisation, along with detailed reports for the teams you are leading.

1. Select one of your teams.
2. See the will/can diagram for your members
3. Read useful information from the tables
4. Select one of the members
5. See personal will/can diagram and tables

Do's and don'ts for giving recognition

When sharing recognition for behaviour, performance or achievements, observe the following recommendations, which will help you do that positively and professionally:

1. The golden rule is "**Purpose of the recognition must be positive.**"
   This means you must not be negative, critical, cynical or sarcastic, and you're not to give 'double signals' by sharing a positive recognition of a negative behaviour.
   Only give recognition when your intention is positive.
   Stay polite, friendly and open. Remember, you are responsible for your relationships.
2. Positive recognition is the norm and should be given to every member, including team leaders or any superior. There are no company hierarchical limitations. Anybody can recognise anybody, and we encourage you to do so!
3. Do it immediately! Do not hesitate. When you see people doing things right, achieving goals, or performing well, you should tell them by sending a recognition – “giving them a pat on the back”, the sooner the better.
   Only prompt and honest recognition will develop your team relationships and develop people’s behaviour.
   Delayed recognition diminishes in value.

Don't undertake or exercise the following:

1. Act dishonestly or unprofessionally by engaging in unprofessional behaviour, by posting inappropriate, inaccurate, or objectionable content, or by publishing inaccurate or "second-hand" information.
2. Disclose sensitive personal information such as members' email addresses, phone numbers, street addresses, or other confidential information;
   Please read our Privacy Policy and Terms of Service.
3. Create a Member profile for anyone other than yourself.
4. Harass, abuse or harm another person, including posting unwelcomed communications.
5. Use another's account or create a false identity, or attempt to do so;

For more help, personal training, or answers to your questions, please e-mail us at support@practicalmanager.com. We're here to help!