



SIMPLIFY PROJECT MANAGEMENT, TIME MANAGEMENT & ACCOUNTING

In this module, you will learn:

Strategies for blocking out time on your calendar

A system for prioritizing which work to focus on each day

A system for prioritizing and managing incoming requests

How to handle the potentially overwhelming amount of tasks involved in working with multiple clients

How to focus on creative work



SECTION 1: THE BIG PICTURE

TIME BLOCKING

PRIORITIZATION

**DETAILED
SCHEDULING**

“It is not the strongest of the species that survives, nor the most intelligent that survives. It is the one that is most adaptable to change.” - Charles Darwin

A. THE BIG PICTURE

“If you don’t make room for the big things in first, they will never fit in”

In Steven Covey’s book, *7 Habits of Highly Effective People*, Covey uses the concept of a jar filled with rocks to illustrate how one can fit in more in their “jar” by putting the big rocks in first (jar on the right). Whereas, if you first put in the smaller rocks, you will run out of room trying to fit in the larger rocks afterwards (jar on the left).



Taking this example to the concept of time management, you can see how spending your time focusing on all the little tasks, will keep you from being able to attend to the big, important tasks. Conversely, if you focus on the big tasks first, you will be able to make room for the small tasks.

Therefore, it is important for your own time management to first focus on all the big picture items, on a monthly, weekly & daily basis, to avoid getting distracted by the tasks of less consequence - regardless of their apparent urgency in the moment.

To avoid getting sucked into trivial but urgent items one must carefully plan one’s activities and continuously focus on the big picture. Without having done that analysis, urgency will inevitably subvert importance.

Covey explains that highly effective people focus on the important items first, which results in an expansion of their influence and resources, which makes accomplishing other things all the easier.

B. FOCUS ON THE IMPORTANT ITEMS: TIME BLOCKING

It is very easy, as a freelancer managing multiple projects, to get overwhelmed with the daily requirement for communication, new task requests, marketing, administration and big picture projects you are working on.

That is why it is important to put in place a system for prioritizing and segmenting your work to keep all the expectations in front of you in balance and in check.

The traditional way to keep track of work, for many professionals, is using a to-do list. However, to-do lists alone often do not allow for the kind of prioritization and flexibility needed by freelancers managing multiple projects. They also create an endless list that rarely leaves the freelancer feeling very accomplished at the end of each day.

While a to-do list is helpful, I suggest that it is merely a supplement to a larger system, which primarily should be taking place through time blocking, or “calendar” as some call it.

HOW DOES TIME BLOCKING WORK?

Time blocking is different than creating a to-do list, because it allows you to much more accurately predict the amount of time you actually have in a given day/week and match that up to the work that needs to be done. The premise is that you block out chunks of time for each of your Priority Projects you are working on, rather than just listing out what needs to be taken care of and working from the top of the list downwards. It allows you to control your time and focus much more, and feel a sense of accomplishment for the efforts as you work.

STEP 1: DETERMINE YOUR TIME BUCKETS

First, identify what the main types of activities you need to do each week are. This is high-level, and doesn't change from week-to-week in general.

Examples of typical time buckets and themes in a freelancer's work week:

THEME: BUSINESS ADMINISTRATION

- Business building (“CEO mode”, marketing, business strategizing)
- Billing & accounting
- Learning new skills

THEME: NONBILLABLE TIME

- Project review/task list prioritization
- Reviewing emails, regular communications, task list updating
- Non-billable work for clients (it's common to have some time eaten up here - a goal is to keep it as minimal as possible)
- Personal/creative time (Exercise, journaling, blogging, etc. if its part of your workday or work routine)

THEME: MEETINGS

- Meetings with prospects
- Meetings with clients (may also be considered billable time, but can be useful to separate if it requires prep time, travel time, etc.)
- Networking

THEME: BILLABLE TIME

- Billable time, misc. projects
- Billable time, ongoing yearly client (Sometimes this is separated out as a second type of billable work if you work on-site or primarily for one main client)

List all your regular tasks, their theme (feel free to use the above or your own), as well as their frequency. The most important aspect of this exercise is identifying what types of activities are needed in your business on a regular basis. The items in this list should be constants within your business - not specific to a particular client or project.

EXERCISE A: YOUR TIME BUCKETS

TASK TYPE	THEME	FREQUENCY (daily/weekly/monthly)
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



A sample of a weekly outline:

	Su	Mo	Tu	We	Th	Fr	Sa
	No work	No meetings all day				No meetings all day	No work
Early		Creative time	Creative time	Creative time	Creative time	Creative time	
Morning		Weekly priorities and calendaring	High-priority Billable work	High-priority Billable work	High-priority Billable work	High-priority Billable work	
Afternoon		Business building	Billable work Email & non-billable work	Billable work Email & non-billable work	Billable work Email & non-billable work	Check email/task prioritization to wrap up week	
Evening		Nonbillable catch up work (if needed)	Nonbillable catch up work (if needed)				

EXERCISE C: YOUR IDEAL WORK WEEK OUTLINE

Create your own sample weekly outline, based on overall themes for your activities:

	Su	Mo	Tu	We	Th	Fr	Sa
Early							
Morning							
Afternoon							
Evening							

WHAT IF YOUR SCHEDULE CHANGES FROM WEEK TO WEEK?

Creating a default weekly outline does not mean each week has to look exactly like this. On a weekly basis, you'll want to plan to schedule your actual hours, which we'll take a closer look at later in this work book.

C. PRIORITY PROJECTS

Now that we've defined your ideal weekly schedule and time buckets, let's focus a bit on how to manage the influx of projects and priorities that come up when working with clients.

At any given time, can you name the top projects and priorities that are on your plate? Which ones are waiting for work from you, which ones are being held up by others, and which ones are on hold? Making sure you have a way to keep track of this can really help you feel in control of your work. Here's a simple chart you can use for tracking this -- or, you can keep track of this within a project management software.

EXERCISE D: PRIORITY PROJECT TRACKING CHART

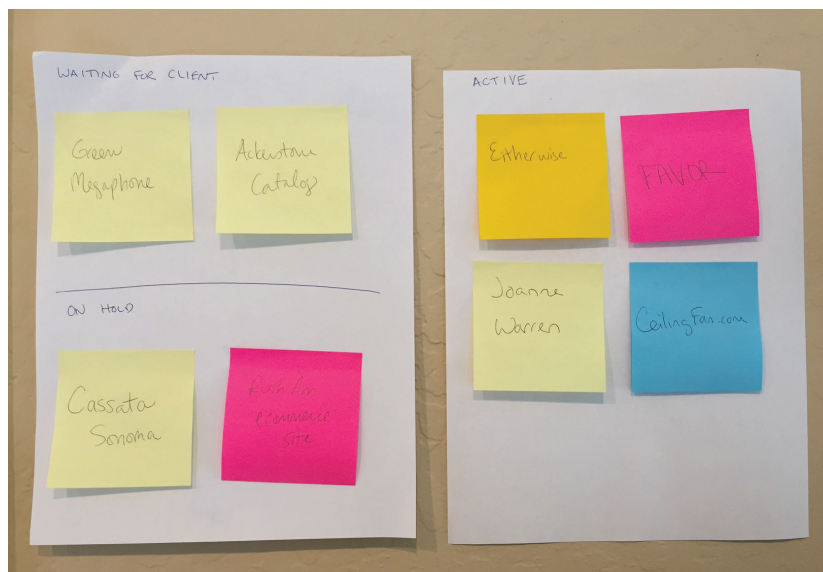
Feel free to fill this out for your current projects, here, but plan to create this somewhere outside of this work book for ongoing use. In the first column, enter all your current big projects. I recommend keeping track of your top 10 projects, or all projects you're currently working on in which you've committed 10 hours or more to, in a format like this -- either digital or physical. If you have multiple large projects for one client, separate them out as well. Then, enter an "x" in the appropriate column (active / waiting for client / on hold) for each project.

PROJECT NAME	ACTIVE	WAITING FOR CLIENT	ON HOLD

Sometimes the simplest systems are the ones you are most likely to keep up-to-date, so I don't recommend making this overly complex. I recommend you create a system for keeping this top-of-mind every work day. Ways you can create this:

- Whiteboard (use the chart above, write in each project name and use a magnet to denote which column each project is in)
- Post-it notes (see photo below)
- Within Project Mgmt Software (simply create lists to show these - useful if you regularly work different places since it's digital)

EXAMPLE: POST-IT NOTE VERSION



Make sure it's an easily updateable format that you will constant keep up to date as Priority Projects move in and out of your queue. There is a huge amount of mental relief that comes from tracking your Priority Projects in this way.

LEADS

After your big projects, the next most important big picture item to regularly track is your leads - the people, organizations or companies that you have reached out to, or have reached out to you, and may become potential clients. While there may be many emails or requests that grab your attention on a daily basis, those that are from your leads are the ones you want to always be watching out for and ready to respond to quickly.

Keep a running list of all leads, and update it regularly, next to or in a similar place as where you keep track of your Priority Projects.

WHY KEEPING TABS ON THE BIG PICTURE MATTERS

With a list of leads and your biggest projects always in front of you, you have now created a system to automatically prioritize the projects and tasks that are most tied to your short term income. Outside of working on marketing, sales and overall business-building, these are the moving parts that always should be getting your priority.

D. DAILY TASKS & PRIORITIZATION

We've covered the three important components of planning and prioritizing your time, which helps you determine the big picture priorities for your business and work day:

1. Your ideal weekly schedule, made up of the balance between business-building, billable time and non-billable time.
2. Your current Priority Projects
3. Leads for future work

But the reality of a freelancer's week is that there are many small day-to-day tasks and urgent needs that come up. If you are not careful, like in the Steven Covey example with the "small rocks," it can be very easy to let these small tasks overwhelm you and keep you from prioritizing your days and weeks based on the most important tasks at hand.

Here are some tips to help you with daily requests and the small tasks that inevitably come up as part of or in addition to your Priority Projects and business priorities.

1. CREATE ONE CENTRAL PLACE FOR ALL YOUR TASKS/TO-DO LISTS

It can be so easy to let tasks build up in multiple places, but this can subvert your ability to prioritize your work, because you're never looking at everything at once. You can become incredibly reactionary to what's right in front of you, instead of being able to step back and take care of what's most important, if you aren't seeing everything at once.

Many freelancers find that project management services like Basecamp or Asana are good places to keep their to-do lists. These services also have the advantage of sharing to-do lists with partners, subcontractors and clients. If you haven't experimented with project management software, I recommend trying out one as part of your new project management process (a list of several is in the appendix).

While some people may prefer paper, there are several disadvantages of writing your list on paper: 1) it is less portable; 2) it is slower to copy digital messages to/from; 3) it can not easily be shared with collaborators; and most importantly, 4) it can not be re-ordered for prioritization quickly.

WHAT IS THE ONE PLACE YOU WILL KEEP ALL YOUR TASKS AND TO-DO LIST ITEMS, AND COMMIT TO KEEPING UP-TO-DATE?

The key is to commit to one central place and move all requests that may temporarily be recorded or come in from another location to be moved to the central to-do list. This includes:

- Action items from client meetings
- Voice mail requests
- Text message requests
- Email requests
- Action items you want to write down to get them “out of your head”

2. SET A TIME EACH DAY TO CHECK YOUR EMAIL AND PRIORITIZE AND/OR MOVE REQUESTS TO YOUR TASK LIST

In order to focus on your creative tasks at hand, you will find you are best off *not* checking your email at all times of the day. There are plenty of times where you’ll need to focus or be with a client for 2-4+ hours, so your clients should understand that you won’t be responding right away to their communication with you. A turnaround of 4-8 business hours for a non-urgent email is acceptable. It helps you focus on doing your best work, and that’s in the best interest of your clients as well.

WHAT TIME OF DAY IS BEST FOR YOU TO PRIORITIZE TASKS AND REVIEW EMAIL COMMUNICATION?

When you do check your email, plan to do so actively, rather than passively. That is, you’ll want to quickly move through your email and determine what action is needed for each.

One system for doing this is a quick “flag” of any email that requires follow up from you. Here’s how you can do this:

- Red flag: must be done today
- Orange flag: should be done as soon as possible
- Yellow flag: Lower priority, but requires an action
- All others: delete or put in a “read” folder that no longer sits in your inbox

This allows you to:

- Check through your email at a regular time each day, and work on the items flagged as red (“do today”) first
- If you have more time, go through the orange flagged emails next
- Take any flagged emails you can’t get to and move them to your master to-do list (in your project management software or wherever it esides). Once you move them to your project management software, I suggest moving the email itself to a separate folder such as your “read” folder so that they don’t clutter your inbox any more

You can accomplish this same prioritization strategy with folders, instead of flags, if that works better for your email program. You also can set up a project management program to receive emails you “send it” and forward your emails into lists right within your system.

3. DIVIDE YOUR TO-DO LIST INTO PRIORITY BUCKETS

Just like with the prioritization of your emails, you'll want to prioritize your master to-do list. Ordering the list is certainly helpful and advised. It is also helpful to create clear sections for each level of priority, such as "today," "soon," and "eventually" (or something to that affect). You can do this with sub to-do lists, color coding, or creating separate sections depending on which project management software you use. As you work through your to-do list, this helps you see what is most important at any given time. You can also set deadlines for yourself with most programs.

4. DON'T LET YOUR EMAIL BE YOUR TO-DO LIST

The reason you don't want to let your email function as your to-do list, is that there's always more coming in that you aren't in control of. This can leave you feeling like you "never can catch up" and can be very unmotivating. By moving things to your master to-do list, you can see what needs to be completed "today" and get a sense of accomplishment by marking those off. You also can prioritize based on need rather than the order the email came in.

YOUR TO-DO LIST VS. PRIORITY PROJECT TASKS

So you're probably wondering by now how tasks related to your Priority Projects (the ones identified in your Priority Project tracking chart in Exercise D) relate to your master to-do list. If a request comes in that is part of a Priority Project, does it go on the master-to do list?

This depends on how you choose to manage your bigger projects. If you are not using project management software that allows you to create separate projects, then all your projects are likely being tracked in one place, within your master to-do list. But, if you are using Basecamp, Asana or another more complex Project Management (PM) software, you're likely going to take advantage of the ability to separate projects into their own set of discussions, to-do lists and files.

Separating out your projects in PM software has advantages, such as:

- You can loop in a client, subcontractor or partner and allow them to see project information specific to that work, without seeing your other tasks unrelated to their project
- You can create multiple lists and action items for larger projects -- often important for breaking down a complex project into small steps
- You can keep all project-related work together and more organized

However, there can be disadvantages of creating a separate project and task list outside of your master to-do list:

- The task list may not be visited often and gets outdated
- You find yourself having too many task lists to check into
- You have trouble weighing priorities when you can't see everything you need to do in one place

Therefore, if your project doesn't require it's own "project" setup in PM software, it is often more efficient to keep tasks for your projects all in your master to-do list. It is simply much easier to keep everything you need to do, if it requires that you write it down, in one place. This is highly related to individual projects and workflow. For my business, for example, I create separate projects for *some* of my projects, and this is usually only when I have other people (partners, subcontractors, or clients) who need to check in on them.

E. DETAILED SCHEDULING

COMBINING BIG PICTURE PLANNING, PRIORITY PROJECTS, AND YOUR MASTER TO-DO LIST

We've now covered all the elements that make up a typical freelancer's week, and discussed prioritization systems for each. But the tricky part can be pulling it all together.

Remember the weekly calendar exercise (Exercise C) from earlier in this work book? This exercise had you define an ideal work week in terms of what aspects of your business you wanted to focus on. However, it didn't have you create a schedule based on a "real" week or take into account your actual projects. It gives you a guideline to use for any week, but in my experience, each week has its own unique needs that should be accounted for. You may be tempted to just stop there, and simply work from an "ideal week" and just deal with the scheduling changes from week to week that may come up.

But this can leave you feeling frustrated when you can't stick to your ideal week's schedule. Taking this a step further can eliminate so much frustration and allow you to really plan for the reality of your week while setting you up for full flexibility and freedom to work when you want, and how you want. By creating your schedule each week anew, you can easily find ways to take an entire day off to travel, be with family, or set yourself off for a digital nomad experience because it gives you the structure of a typical workweek, applied to your specific schedule, for any given week without feeling like you aren't fulfilling your obligations to your clients and your commitments to your business.

HOW TO CREATE A SPECIFIC WEEKLY PLAN

First, you'll want to make sure you have a clear calendaring system for yourself. This is another highly individualized preference - whether you use Google Calendar, iCal, Outlook, or some paper version or cross between of multiple methods.*

On that calendar, make sure you include:

- Any deadlines that you've committed to from your Priority Projects (using your timelines we discussed in the last module)
- Any meetings you have set up
- Any date-based reminders (such as taxes due, etc.)

At the beginning of each week, you'll be creating a specific schedule on your calendar.

1. Mark off your work start times and end times throughout the week. You may not be working a typical work week, so this allows you to take into account personal time or plans that are unique to that week.
2. Enter in any appointments or meetings that you've already established.

* I find that I like to have two calendar systems -- one for my week-by-week hours, and another for my entire calendar by year where I put appointments and deadlines that can reach forward several months (and this is separate from my family calendar where I keep track of all of my family's activities!).

3. Mark off which hours, specifically, you will do each of the activities you put in your ideal work week (Exercise C). This should look very similar to Exercise C, except it will take into account your specific week's meetings and work start and end times, which may be unique for that week alone.
4. In a sidebar, list specific actions or goals for the work you'd like to complete that week.

This activity should be done the night before or first morning of every work week, if you have irregularities at all in your schedule that require redefining your hours per task each week.

DAILY PLANNING

Each day, start by looking at your weekly calendar to determine which hours you will use for which activities. This is the time to get specific, if you haven't already, about which projects within each task type you will do.

For example, if you have 3 hours set aside for business-building, what will you focus on? If you have 3 hours for billable work, which projects should get your attention first?

1. For billable work, look through your priority projects from your Priority Project Tracking Chart (which you may have created in Exercise D. but you should re-create and have somewhere digitally or near your workstation for easy reference). List out which projects you will focus on that day. Often it is helpful to list out the projects and tasks you plan to tackle, then write out how much time you will spend on each, and then write a number for the priority you will give the project that day. This is an important exercise, because you may see that you have more on your list than you have hours in your day. Writing these out this way will allow you to adjust your expectations and remove items from your daily list that you can not get to. Take into account deadlines and priorities based on client's needs. Because freelancing projects are highly dependant on client input, content and feedback, re-prioritizing your projects each day to determine where to best spend your time is common.
2. For business-building work, be sure to keep your commitments to yourself when you've scheduled this time at the beginning of your week. You should keep a running to-do list of projects and ideas for building your business in your PM software or separate task list, and prioritize that work the same way you would your billable work.
3. Include time each day for simple to-do list prioritizing, finishing small items unrelated to your priority projects, email communication and non-billable work. I recommend putting this at the middle or end of the day, since it is lower priority than your other activities.

One question you can ask yourself when you are planning your day is, "What work will make me feel most accomplished or successful to get completed today?"

Often times, getting the dreaded project or the project that is consuming the most mental space, is more important than anything else because it helps clear your mind to focus on more creative work thereafter. Give yourself permission to complete a low priority project if it is causing mental clutter.



SECTION 2:

FOCUS

TIME TRACKING & INVOICING

“Always remember, your focus determines your reality.”

- George Lucas

FOCUS

One of the biggest difficulties as a freelancer or for anyone working from home is distractions.

Hopefully, by creating clear goals and plans for your time, you'll minimize your willingness to be distracted with a clear-cut set of expectations for yourself at the end of each week, day and hour.

Key ways to control your schedule:

- Choose 1-2 times per day to check email/prioritize tasks. You do not need to check email in between these times if you create structured time for this communication and task prioritization.
- Choose at least 2 days or several half-day blocks where you do not allow meetings. This helps create focused work time for business-building or creative billable work time.
- Plan the work that requires your highest level of creativity at times of the day you can focus best. For "morning people," this is at the beginning of the day. For others, it may be evening or when their workspace is the quietest.

A few recommendations if you are still having trouble focusing:

- It is better to leave your desk and recharge, than to simply sit and be ineffective or inefficient for a long period of time. Exercise or socialization in the middle of the work day is a worthwhile way to recharge.
- There are some good websites for distraction-free audio, including focusatwill.com and coffitivity.com
- Save your production-oriented or repetitive work when you usually have the least energy.
- Consider hiring a subcontractor for work you truly don't enjoy doing
- Start your work day by listing and prioritizing your work for the day, not with your email
- Set aside focused work time, in which you do not answer phone calls and have large blocks of time without meetings
- Stay off of social media and email during focused work time
- Set aside certain days for meetings and certain days without any meetings

A WORD ABOUT MOTIVATION

Have you ever noticed that you can get the same task done in half the time if you *really, really* want to? What could you "treat yourself" with to entice this kind of focused work? Consider what you really want to be doing, if you had time to do so, and how you might create mini-incentives within your week or day to help you tackle projects more efficiently. It's amazing what a little extra motivation can do to help us get through our work quickly! You are a freelancer - you are in the enviable position of creating a schedule on your terms - so take advantage of it and treat yourself to help create extra motivation to work harder.

TIME TRACKING & INVOICING

One of the best things you can do to simplify business administrative tasks as a freelancer is to set yourself up

with time tracking and invoicing software.

There are several good ones to choose from (listed in the appendix) - the most common are Freshbooks and Harvest.

The advantages of using time tracking & invoicing software:

- Greatly reduces the time spent tracking invoices
- Allows payments to be accepted online through the software
- Allows easy time tracking to start and stop projects fluidly while working
- As a web-based software, allows time tracking from any device or location
- Allows subcontractors or partners to track time related to projects
- Sends out automatic invoices (for recurring billing)
- Sends out late payment reminders
- Invoices automatically look more official

There are some disadvantages, such as needing an internet connection to use the service, and a potential for data loss if for some reason the service went down (but you can export to backup your data), but these are far outweighed by the advantages.

I also recommend setting aside time for your invoicing just once or twice per month, except for new client deposits.

Overall, using an invoicing and time tracking tool is highly recommended for freelancers if any of the above benefits are appealing - and a huge time saver.

MODULE 4 SUMMARY

Key Takeaways:

- Planning your goals, priority projects and work week helps you prioritize the most important work for your business
- Creating a weekly schedule helps you be flexible with your work days and other commitments
- Writing down daily goals, time needed and priorities helps you adjust your expectations about your work day and feel more accomplished at the end of each day

USE THIS SPACE TO WRITE DOWN ANY FINAL NOTES OR PLANS ABOUT YOUR HOW YOU PLAN TO CHANGE YOUR SYSTEMS AS IT PERTAINS TO PROJECT MANAGEMENT, TIME MANAGEMENT AND

LIVING AN INSPIRED LIFE

My hope for you, is that when all it's all said and done, you can say,

“Yes, I didn’t just live my life, I lived an inspired life.

I didn’t just visit the mountain, I climbed it. I didn’t just read about the jungle, I trekked through it. I didn’t just admire what was beautiful, I created it. I didn’t just read about amazing lives, I built my own.

I consumed with passion the beauty around me.

I shared the vision that life is an open world to explore with my children.

I taught the lesson of gratitude and happiness through my actions, not just my words.

I followed my dreams, opened my heart, and faced my fears because the best way

I can pass that love of life on to my children is to show them I lived it myself.”



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“WHEN YOU REALLY WANT SOMETHING TO HAPPEN, THE WHOLE WORLD CONSPIRES TO HELP YOU ACHIEVE IT.” - PAULO COHELO, FROM THE ALCHEMIST