

Organizational Skills and Time Management

Presented by: ATI Collision Division







Does everything go as planned and in the timeframe, you have identified? If not, this presentation will help you organize your processes and develop timetables for process implementation that will help keep workflow and customer service on track. Team organization and execution through setting expectations and developing follow up processes is key to your success.





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ABR



Organizing To Set The Pace:



Decisions Productivity Productations Expectations Decisions D

Setting the Pace:

- Organizing the workplace to manage it more efficiently
- Communication skills must be at a level where setting expectations and follow up become second nature
- Leadership and organizational must work hand in hand
- You've learned how to lead in previous presentations
- Establishing process steps and commit to follow them





Organizing To Set The Pace cont'd:





Setting the Pace cont'd:

- Make lists
- Identify what needs to be done
- When it needs to be done
- Create a vision of what success looks like
- Communicate clear objectives
- It's about being consistent, developing repeatable processes that are clearly communicated but also having the discipline necessary to ensure that the team follows your organizational lead







task

NOUN

- 1. a piece of work to be done or undertaken.
 - synonyms: job · duty · chore · charge · labor · piece of work · piece of business ·







organization

NOUN

1. an organized body of people with a particular purpose, especially a business, society, association,









time management

NOUN

the ability to use one's time effectively or productively, especially at work.

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Organization





- Building process organization from start to finish
- Developing a consistent work plan
- Committing to following processes and procedures which have been determined to be the company's "roadmap" to success
- Building accountability and best practices into daily activities





Setting Performance Goals





- Establishing goals that you and your team will need to establish
- What needs to be done
- When does it need to be done
- How does it need to be done
- Performance metrics and accountability





Developing Process Expectations





- Identifying then setting performance expectations
- This can be as specific as necessary
- Placing the task lists in order of importance
- Establishing the timing to which the goals are to be met
- Each team members responsibilities identified
- This would include the team leader
- Soliciting team input will be important here
- Their input will bring their support of the expectations





Process Development





- Accountability requires all team members to "pull in the same direction"
- An overarching business plan including process steps is key to the success of the team
- This allows all the participants to observe the requirements they will need to meet and the process order
- Current and future state process maps will help identify where the organization is currently and where you want it to be in the future





Process Execution





- Establishing how the process is to be executed will be essential to its success
- This is where time management will be necessary to ensure that all participants will be able to meet process requirements
- Each set of tasks must be timed so that all obligations can be met in the timeframe that is anticipated for them
- Keeping everyone on track is the team leader's role and responsibility
- Communication is the key





Setting The Example



Selfor	
•	What's your plan?
•	Are you organized?
•	Do you have a task list?
•	Do you follow processes?
•	Do you set expectations?
•	Do you validate things are getting done?
•	What's in your daily schedule?
•	What gets in the way?
•	What's left over at the end of the day?





What Is Process Organization?





- When things are left to chance, employees will do what *they* feel is right at that moment
- It may or may not align with the company vision
- How can this happen?
 - When we haven't set expectations properly
 - We haven't organized their thoughts through process development and then process compliance
 - When the team leader is disorganized
 - When outside interventions don't follow the process





Help Me Organize Myself and My Team



Step One

- Start simple, you must set the example
- Always have a pad of paper, notebook or some way to document your thoughts, observations or what is witnessed
- List tasks that need to be accomplished or processes that need to be adjusted
- Once listed, place the tasks in rank order
- Establish the who, what when and where relative to task completion
- Identify the timeframe for completion





What Are The Employees Doing?





Observe your team and what they are doing. Is it:

- Benefitting the business?
- The best use of their time?
- Being completed in the right order?
- Measured for effectiveness?
- Too much or too little?

Do they have enough time to complete their tasks?

- If not, why not?





Are They?





- Meeting their task list requirements?
- Following the production or office work plan?
- Performing to the accountabilities been identified for them?
- Meeting their performance measurements?
- Are they "engaged"?





How About you?





- How is your workday organized?
- Are you a doer or a procrastinator?
- How often are you validating employee performance
- Do you have one on ones with your staff?
- Are you measuring both individual and team performance?
- Are you communicating results?
- Do you feel overwhelmed?







Something to Think About:



- Have task lists been created that identify what the employee is supposed to be completing daily? If not, why not?
 - You can't manage what you aren't measuring
- Have timeframes for performance been established?
 - You can't hold them accountable if you haven't established performance guidelines
- Are you conducting team meetings?
 - Communication is the key. It will help everyone stay focused on the expectations
- One on Ones
 - Individual meetings need to be established and followed
 - This will allow for individual conversations about performance

timing

the choice, judgment, or control of when something should be done.







- What is each team member supposed to do?
- When are they supposed to do it?
- Do they know what their role is in the success of the business?
- Are you taking the time to ensure that:
 - They know what they are accountable for
 - How each tasked is ranked in order of importance
 - How their success at task completion will be measured
 - What happens if tasks aren't completed?

							1	Production management
								 Assign repair orders to the technicians
								1. Determine the number of hours that are available by job and by tech
								 Assign hours to the technician and record for the status board
								 identifying labor hour assignments
								 Track tech hour requirements, assigned hours and daily WIP
								 Make sure that numbers are updated to the status board daily
								c. Handle in process quality control.
								 Identify any in-line re-dos and their cost (Use comeback form)
								Identify and track any external comebacks
								iii. Identify technicians responsible and the cost to the company
-		÷						d. Order parts
	ask I	ict						 Verify the parts order
	asn 1	121						 Check in the parts when they are received
								iii. Mirror match parts
								iv. Input invoices into CCC
		lob	e Completed	br				 Any changes or returns complete return slip
								vi. Core returns verify that they have been completed
8	Level of Efforts	5	Estimated	Estimated	Atual	Actual		vil. ? Close files relative to parts transactions?
	(Hours)	Complete	Start Date	End Date	Start	End		e. Material orders
					Dete	Cate		i. Paint liquids - review orders prior to delivery, then check in and stock to
_						-		cabinets
								 Allied – create order for materials, check in and stock to cabinets
								iii. Inventory controls on all materials - complete monthly inventory
							2	Production Meetings
								a. Prepare for production meetings - management and technician
								 Identify whicles coming into production
								 Identify what needs to be completed daily
								iii. Identify any issues that may impact any deliveries
								b. Conduct production meetings
								 Assign jobs to the technicians
			_			-		Identify WIP production
								iii. Identify paint production
						-		 Determine deliver sequence of repaired vehicles
		_			-	-	З.	Monitor production team
			-					a. Monitor production efficiency
		_				-		i. Compare assigned to completed hours to clocked hours
		_	-			-		b. Monitor individual and team billed hours per day
		_			-	-		I. Individual performance requirements as compared to actual performance
	_		_			-		c. Monitor mistakes made during production
								i. Monitor and react to any in-line re-dos
_								d. Develop corrective action plans as needed
								a better to the second parts as included





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Time Management





- Time is a precious commodity that needs to be managed
- Establishing priorities and setting expectations are the key to success
- Does everyone know what they are responsible to do or complete?
- Each task should have a timeframe for completion
- Set the expectation for task execution with the employee responsible for it
- Measurements and follow up should be done to ensure that the expectations are met





Setting The Shop Up For Success



- Organization means making sure that time spent on anything you do moves you and your team to the intended goal
- Knowing what comes next and communicating it to the team
- Wasting time is something managers and businesses can't allow to occur







Setting up Your Production Board



- Set up folders in your PC, file drawers, wall systems and production boards
- This no will provide a place to begin to organize your processes and procedures
- This will help to reduce time spent looking for things so that you can better manage your time



Move files as vehicles change departments When files get to reassy you can begin pre-close process to ensure you have what you need to deliver the car without issue

Production Board









	Time Management Log											
Name:	ame:Today's Date:											
Today's	oday's Daily Goals											
	oal 1: Goal 2: Goal 3:											
Goal 4:	Goal 5:Goal 6:											
	Priority: A-Important B-Somewhat Important C-Not Important *-Urgent											
Start												
Time	Time	Spent	Activity				Did you plan to do this now?	Notes/Comments/Results				
Time	Time	Spent	Activity			Priority	uo unis now:	Notes/Comments/Results				
	_	_										
	_											
	_	_										
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		-										
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	_	_										
	_											
Start	End	Time					Did you plan to					
Time	Time	Spent	Activity			Priority	do this now?	Notes/Comments/Results				

- Time management logs will assist in keeping both managers and employees on track
- These help to ensure that activities are identified in rank order
- It helps all that are touched by them organize their activities and responsibilities to meet deadlines for completion
- Goals are established for each day following the key metrics the employee is responsible to meet





Organize Your Workflow



• Once all the tasks are identified, make sure that right person is handling role relevant tasks



- If not, make sure they are properly aligned to improve efficiency
- Create a process make that allows you to see the big picture and where production or office roadblocks may exist
- Talk with your staff and make sure that critical infrastructure, materials and tools and equipment are in place and functioning. If not, have them provide input on potential changes that would eliminate waste
- Conduct team meetings to not only provide work to the employees but to also get feedback on how your processes are working







Practicing Active Listening Skills





- Be attentive
- Ask open ended questions
- Ask probing questions
- Request clarification
- Paraphrase
- Be attuned to and reflect feelings
- Summarize

Get feedback from your team on the effectiveness of the workflow. This will be a constant

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Your Responsibility





- Identify what needs to be done
- Set up timeframes for action and activities
- What are the target dates for completion?
- What instructions are necessary?
- When is training required?
- What will you do in your support role to help them achieve the goals?
- Be prepared to coach them through the processes
- Jump in and help if the situation requires it. It shows that you are part of the team





Getting Organized





- Be prepared to lead the team
- Use tools that will allow you to get and remain organized so that you can in turn get the team organized
- Everything organizationally, you are asking them to do, you will need to do yourself. Doing this while monitoring the team to ensure that they are meeting expectations
- Setting a daily workplan for yourself is not only difficult to develop but at times, even more difficult to execute
- Ensuring that processes are consistent and repeatable processes
- It takes discipline
- Start simple then expand your worklist and timeframes as you go





Time Management, For Managers



	Time Management Log										
Name:	ame:Today's Date:										
Today's	oday's Daily Goals										
Goal 1:_	oal 1:Goal 2:Goal 3: oal 4:Goal 5:Goal 5:										
Goal 4: _				Goal 5:			Goal 6:				
	Priority: A-Important B-Somewhat Important C-Not Important *-Urgent										
Start	End	Time					Did you plan to				
Time	Time	Spent	Activity			Priority	do this now?	Notes/Comments/Results			
	_										
	_										
	_										
								1			
	_										
Start	End	Time									
						.	Did you plan to				
Time	Time	Spent	Activity			Priority	do this now?	Notes/Comments/Results			

- Create your own time management log
- Identify critical steps that need to be performed during your day
- Set them up in priority order so that you ensure their completion
- Set timetables for performance
- Monitor the length of time for each performance area and do you best in sticking to your plan. You may have to adjust timeframes and that's OK
- Measure how well YOU did in keeping to the plan

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Time Management for Managers



Time Management Log								
Name:		Today's Date:						
Today's Daily Goals								
Goal 1:	Goal 2:	Goal 3:						
Goal 4:	Goal 5:	Goal 6:						
	Priority: A-Important	B-Somewhat Important C-Not Important *-Urgent						

- What are your goals for the day?
- What priority ranking are each of the goals?
- Is there are timeframe for completion?
- Are any of the goals to be shared with the team?





Time Management Checklists/Logs



	Time Management Log									
Name:			To	day's Date:						
Today's	Daily Go	pals								
Goal 1:			Goal 2:		Goal 3:					
Goal 4: _			Goal 5:		Goal 6:					
	Priority: A-Important B-Somewhat Important C-Not Important *-Urgent									
Start Time										
	+									
	+									
	-									
	-									
	+									
	-									
	End									
Start Time	End Time	Time Spent	Activity	Priority	Did you plan to do this now?	Notes/Comments/Results				

- Organizing work time is a challenge for every manager
- Helping others meet their obligations is part of a manager's role
- You will need to get back on track as soon as possible
- Make note of the exception that took you away from your plan
- Is there a way to avoid that situation in the future?
 - Was it a result of someone else not meeting their responsibilities?
 - If so, that will be a good discussion point for your team meeting
 - All members of the team must execute their roles and be measured on their performance
 - If they aren't meeting their accountabilities, discuss during your one-on-one meetings





Time Management Checklists/Logs



Start Time	End Time	Time Spent	Activity	Priority	Did you plan to do this now?	Notes/Comments/Results	
		-					

- Identify the activity that will be taking place
- What priority level have you assigned it?
- What time will you start your activity?
- What time will you end your activity?
- Was this a preplanned activity?
- All important Notes/Comments/Results



Creating a Goal List



- 1. Write down your goal. Make sure that you provide all the detail that will be needed to make good choices and provide clear direction
 - S Specific
 - M Measurable
 - $\mathsf{A}-\mathsf{Achievable}$
 - R Relevant
 - T Time Focused
- 2. Break them down

Outline your action plans. How are you going to achieve the goals

3. Make sure they are scheduled

Identifying those tasks is a start, but it's still not enough to hold you accountable. In order to

prioritize them alongside the rest of your workload, you need to dedicate the necessary time to them

4. Track progress



"Sticking To Your Goals and Checklist"



You must motivate yourself

- FOCUS
- Define clear, specific goals that must be reached
- Set clear performance expectations, for team members and yourself
- Think about the process not the result. If you have process compliance, the goal will typically be met
- Ensure that not only your process steps followed but validate that team members are following theirs too
- Hold yourself accountable. Complete your worksheet daily (It takes time but once you get used to doing it, the process will become a habit)
- Create a "long-term" work calendar

(This will help you to make sure that upcoming events are factored into your workflow)



Share The Vision



Update, Communicate and Recognize

- Share the results being fully transparent, so good and bad
- Allow the team to have input when decisions are being made
- Be sure to follow up on their use of the time management logs once they have been put into use
- Remember that you are building a culture of responsibility and time management
- Repetitive use of this documentation will help in ensuring that it becomes a "habit"
- Provide positive feedback and recognize those who use the documentation effectively





Make It A Ritual



"Ritualize things that are part of your culture"

- Take time to make role relevant task lists for both yourself and your team
 members
- Make sure that you check off items as your role relevant tasks are completed
- Stay focused on the task at hand
- Think and act strategically
- Don't allow yourself to move away from the goal
- Manage your time through your management checklist





Putting It All Together



- Share the vision
- Organize yourself and your team
- Develop consistent and repeatable processes and processing
- Organize the workflow for you and your team
- Set expectations
- Communicate effectively and often
- Actively listen
- Manage time using management checklists
- Take responsibility for decisions and results
- Recognize good performance







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