

Ask Us Anything

# Effective Planning and Prioritisation

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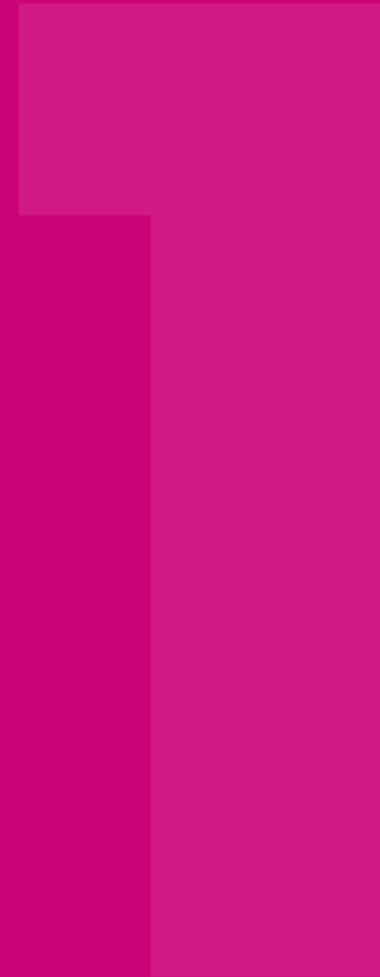
22 May 2024

# Today we'll cover the following

- Prioritisation
- Planning
- Q&A

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# Prioritisation



# Prioritisation matrix



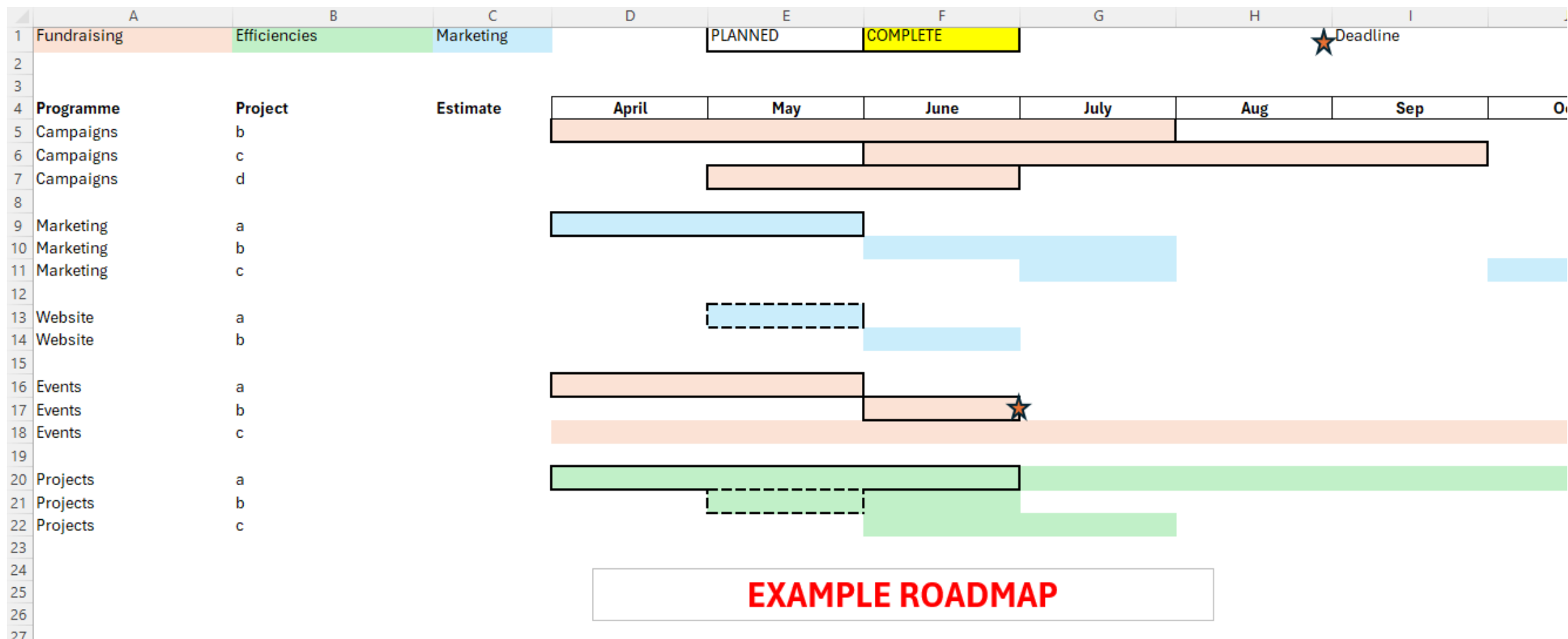
# Day-to-day prioritisation tips

- ✓ Get your to do list **out of your head** and onto paper, computer, sticky notes – whatever format works for you!
- ✓ Categorise your list, i.e. urgent, important, not urgent, not important (**use urgency/importance matrix**). You'll need to be clear on your organisation's and personal goals to do this. Seek support from line manager or others if you need clarification or to sense check.
- ✓ Check where you're missing information like deadlines, info. needed to start, dependencies on others etc. – **prioritise getting that info.** so that when you come to start the task you have what's required.
- ✓ Be realistic with timelines and hitting deadlines – give yourself extra time where possible to **allow for disruptions and changes**. And don't be afraid to challenge deadlines and priorities given by others.
- ✓ When urgent tasks with genuine immediate deadlines come in, sometimes you'll have to replan your day/week. **Review all your priorities at this stage and communicate with the people it impacts** – be clear on why.

# Day-to-day prioritisation tips

- ✓ Consider **breaking larger tasks down into smaller parts**/sub-tasks and focus on one bit at a time. Give each smaller task its own deadline.
- ✓ Try to focus on **one task at a time** and complete it before moving on.
- ✓ **“Eat the Frog”!!** Do the task that scares you most or is hanging over your week / day sooner rather than later. Putting it off will add stress and only prolong the inevitable.
- ✓ Regularly **review priorities** and to do list – in most organisations, things change daily.
- ✓ Try to **minimise interruptions** to allow you to focus, particularly for larger and more important/urgent tasks. Switch off any messenger apps, book a quiet room. Warn people/communicate when you’re unavailable.

# Roadmapping



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# Planning





# Types of work

- **Personal** – planning your own time (diary management, meeting notes, actions etc.)
- **Business As Usual (BAU)**: the standard activities a business undertakes to maintain operation / tasks that keep a company running, i.e. ongoing website maintenance, rolling content creation, performance reporting.
- **Projects**: set outcome, deliverable, timeline
  - Work that needs to be delivered to a specific deadline, has a practical deliverable or a specific outcome, i.e. a campaign or event

# Personal planning tips

- ✓ **Schedule uninterrupted time** in your calendar to focus.
- ✓ **Schedule time in after meetings to catch up on notes/actions** – otherwise these can build up, and other people may be depending on them for their own progress with tasks. BUT also share the load on this task in the first place!
- ✓ Use **regular times of week** for re-visiting to do list and planning/prioritising your work, i.e. Fridays, not Mondays! Get it out of your head and put a plan in place for the following week so it's not hanging over you.
- ✓ Ask/get to know how long **other people need to complete tasks**, especially if your work is dependent on them. Keep a log of this for next time to allow for better planning.

# Personal planning tips

- ✓ Clearly communicate with people when you need something from them by a certain deadline and build in time for delays. **Don't let other people's poor planning impact your priorities!** Especially if this is a common theme.
- ✓ Know when people you are depending on are on leave or unavailable and **build this into your planning.**
- ✓ **Record your time** for future planning – allows you to better plan and prioritise in future.

# Personal planning tips – tools

There are several useful free and paid-for tools that can help you to plan your personal day-to-day tasks as well as projects and organisational BAU tasks.

## Task management tools

### I.e. Trello or similar

Consider using a task management tool to plan your day-to day tasks as well as project etc.

- Set yourself deadlines
- Track your own progress
- Keep track of docs and links to help you come back to a task
- Allocate parts of tasks and get support from others
- Keep track of meeting notes/actions

## Calendars

### I.e. Outlook, Google Calendar, or other

Utilise features of your calendar (Outlook, Google/other) to help plan your week/month.

- Block out time when you need to focus, and mark yourself as unavailable if needed
- Colour code different types of work/meetings (use a system that works for you)
- Pause notifications when focusing

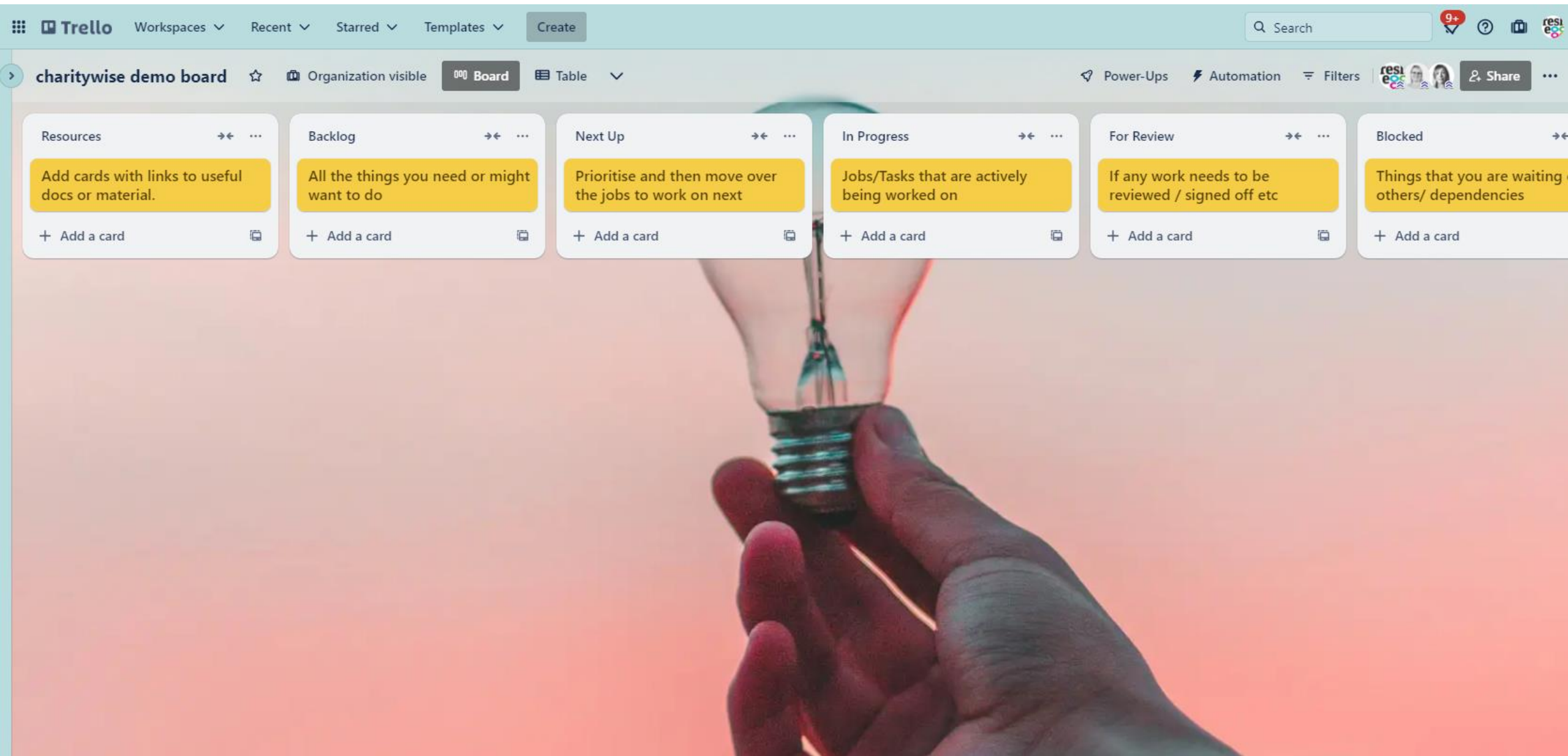
## Messaging/comms platforms

### I.e. Slack, Teams or other

Find the right balance on your chosen messaging platform.




- Use them to support your work – if hindering you, work to find the balance for all parties
- Set your status and use “DND”
- A Slack “Canvas” can help keep track of notes and to do lists – can add checklists and share these

# BAU




**Trello** Workspaces ▾ Recent ▾ Starred ▾ Templates ▾ Create

Search

charitywise demo board ☆ Organization visible **Board** Table ▾ Power-Ups Automation Filters    Share ...


**Resources** → ← ...

Add cards with links to useful docs or material.

+ Add a card 


**Backlog** → ← ...

All the things you need or might want to do

+ Add a card 


**Next Up** → ← ...

Prioritise and then move over the jobs to work on next

+ Add a card 


**In Progress** → ← ...

Jobs/Tasks that are actively being worked on

+ Add a card 

**For Review** → ← ...

If any work needs to be reviewed / signed off etc

+ Add a card 

**Blocked** → ← ...

Things that you are waiting others/ dependencies

+ Add a card

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**Q&A**



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# **Communication**



# Communication tips

## Effective communication underpins the successful planning and management of any project or BAU task

- Ensure comms have landed **and are understood** – i.e. actions, dependencies, deadlines.
- Provide **regular updates** for others on the status of your own actions.
- Try **short “huddles”** to keep key stakeholders up to date and re-confirm deadlines/actions – daily, weekly etc.
- Consider weekly status emails / updates to parties at a set time of the week so it's expected, and they know they will be kept up to date (avoids unnecessary chasing/comms in-between).



# Communication tips

- Be clear on roles & responsibilities **before** meetings (who is taking notes/actions etc.).
- When you are responsible for them, take **clear notes and actions** in meetings and distribute in a timely manner via the best channels to reach everyone – in a format where it's easy to keep up with the status of everyone's actions, and for people to refer to the notes.
- If using Slack (or similar tool) **encourage use of “threads”** – it can be difficult to keep track or refer back to things when people answer a question as a new post and not in the thread, and it also avoids “noise” for others.

# Thank you.

**If you have any questions please speak to Fran Hall**

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**CharityWise.**

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**fresh  
egg**