

Quick Reference Card (QRC)

Best Practices for Scheduling

Planning:

- Identify your professional goals and tactics, which should be the compass for planning daily activities:



- Periodically review and adjust time appropriation to ensure it's being spent in areas that will help to achieve goals:



- Set aside 10-15 minutes a week when it's quiet, to plan out your next week (make it a recurring calendar event)
 - Start by blocking out obligatory appointments, and ensure they are dedicated to activities likely to lead to alpha generation or are key "enablers" to generate alpha (if not, don't attend)
 - During this planning time, reflect on:

Quick Reference Card (QRC)

Best Practices for Scheduling

- “What unique insights did I proactively find this past week that helped or will help generate alpha?”
- If most of your time was spent on reactive/defensive activities, block out time in your calendar as “proactive research time,” at times of the day when you are most productive.

Creating to-do/task lists:

- Record to-do items in one reliable location (never keep more than one to-do list)
 - Accessible 24x7 from any location
 - Syncs between smart phone, work and home computing devices (e.g. Outlook’s tasks, Google’s tasks, Apple’s reminders)
- Find a format that works for you and that allows for flexibility (Getting Things Done, “GTD” and FranklinCovey have two of the more highly-rated options)
- Prioritize tasks to ensure important ones get done first
- Break down large tasks into pieces
- Schedule for long term and short term
- Overestimate how long tasks will take
- Avoid over-booking to allow for interruptions and unexpected urgencies
- Build in breaks for yourself
- Be ready to “let it go” if necessary; not all days will go according to plan

Say “no” when:

- Meetings are ineffective or unnecessary
- You are not the right person for the task
- You need to focus on higher-priority tasks for the firm