

Chapter IX

Self-Management for the Executive

WHAT IS EFFICIENCY? "Efficiency" is an overworked word. Nevertheless it is one that describes the personal skills of an executive and the ways in which he may get his work done easily, quickly, and well. The faculty of effective individual management is sometimes called personal efficiency. Harrington Emerson, in his *Home Course in Personal Efficiency*, which helped to start us on our executive career, says, "Personal efficiency is the easiest, quickest, best, and cheapest way to the desirable things of life." In this chapter some of the easy, quick, good, and economical ways to those things which many executives find desirable in life and work will be discussed. These skills or practices will be useful, moreover, not only to the executive but also to practically everyone in the agency who holds any position that entails the efficient management of his own time.

Overuse of the word "efficiency" has sometimes given it a mechanical and undesirable significance. Nevertheless, efficiency is not incompatible with effective human service. The social worker or executive will find that by the development of methods which seem appropriate among those described below he will be able to accomplish more and better work in less time than otherwise would be possible. He will make the funds available for his work go farther and render better service. He will make more rapid progress in his profession than does the worker who does not strive for effective personal management. Our proposals obviously must be taken not as ends in themselves but merely as the means to economical and effective social service adequately performed.

Efficiency really means the establishment of effective habits of work which release the individual for the constructive and non-routine parts of his job. Efficient performance becomes a rule not of work alone but rather of life itself; of it work is an inseparable part.

PLANNING AS A FACTOR IN EFFICIENCY. It is difficult to give precedence to any one executive technique, because each factor in per-

sonal efficiency depends so much on every other factor. The faculty of planning, however, is perhaps the first which the executive must acquire. If he is really to attain his goals, he must plan each day, each week, each month, each year, and his whole life. Each interval of greater length, of course, should be planned in less detail than the preceding shorter interval. Each morning or evening, using the tickler file, which will be discussed shortly, or some other device, the executive should write down his plans for the day ahead. Every Monday morning he should write out in less detail the plan for the week to come. In the same way, at the first of each month he may plot out the major engagements of the month and the most important things to be done. At the beginning of the year he may plan his own main activities for the twelve months ahead. Then, too, in staff conference, the whole year's program for the organization may be developed, with the allocation of responsibility for each task which is to be performed. Only by such planning can the executive accomplish or even undertake to know those things which are desirable and worth endeavor.

(a) *Setting Goals as a Part of Planning.* Successful living is largely the selection of the more worth-while things and the subordination of those less important. The executive may find it desirable to make a more or less formal list—first, of those things in life which he considers essential; second, of those which are highly desirable; and, third, of those which are desirable if they can be done. He should try to do these things in this order of precedence.

Harrington Emerson has said that the individual should have major, minor, and lateral ideals. Major ideals are those which form the chief objects of the individual's life. Minor ideals contribute to the attainment of the major ideals. Lateral ideals give breadth to life—through the pursuit of hobbies and of various forms of recreation.

By a conscious selection of goals or "ideals" the executive can order his life with a conscious, unified purpose. Each activity of his will (we hope) be related to the plan of his life as a whole. Here we have that idea of an integrated life again, applied to the individual rather than to the organization. What the executive does will advance that plan, day by day, week by week, month by month, year by year, and decade by decade. When goals are thus established, he may more easily decide what course to take in life's greater or lesser emergencies or dilemmas. Pursue your goals!

(b) *Selecting That Which Contributes to Attainment.* A unified

plan of life and work means, obviously, that the executive will classify his activities. He will concentrate first of all on those things which must be done by him personally and will postpone action on the others or assign them to members of the staff. He must learn not to become a slave to his office or to his dictating machine. He must realize the importance of breaking away from unimportant details in order to do the more fundamental things which may be less immediately insistent. To carry out his plan, he must learn the value of concentration and of completing one job (if he is allowed to) before he begins another. Many executives undertake too many things at once and are consequently unable to complete any of them. A wise executive does not enter upon too many activities or assume too many responsibilities. Selection is vital to an adequate plan for the executive and for the individual.

(c) *Avoid a Foolish Consistency.* Obviously the planner must beware of becoming the prisoner of his plan. Rigid adherence to plans that are found to be ill conceived or have ceased to apply to changed conditions is almost as bad as failure to have any plan. Plans and ideals should be subject to continual "upward" revision in relation to changing conditions and information. Particularly is such progressive flexibility important in these post-war days of rapid change in community needs and attitudes and of shifting programs in social agencies. An "atomic bomb" of social crisis is likely to explode in your face almost any time. Stick to your present plans and ideals until you find better ones, and then do not hesitate to scrap the old for the new.

Remember, too, that plans often cannot be carried out completely, either because your own reach has exceeded your grasp or because the needs or insistencies of other persons or the hazards and unpredictabilities of human and natural events have interfered. Follow, then, that part of your plan which you can reasonably expect to carry through, and attain that part of your ideals which you can encompass. Rejoice at what you have attained. Do not repine at what has not been humanly possible. And keep on trying!

Remember the importance of maintaining a proper simplicity in planning, lest it become daydreaming and absorb so much of your time that there is none left for carrying out the plan itself.

Master your plans and ideals, lest they master you! They facilitate a full life, but they are not life itself.

SCHEDULES NECESSARY FOR ATTAINMENT. Constructive and flexible planning is not sufficient for satisfactory accomplishment. The

plan must usually be put upon a definite time basis or schedule. A schedule is merely a plan in which a definite time is assigned for its execution. In addition to planning his day's work, the executive will find it wise to schedule both the specific engagements and the amount of time to be given to each one. He may do this by means of some form of daily calendar pad or by merely noting on a ruled sheet of paper the hour planned for beginning and completing each task he has assigned himself for the day.

TICKLER SYSTEM AS AN AID TO PLANNING AND SCHEDULING. In effective planning and scheduling, the executive may find the tickler system of great assistance.

(a) *Tickler Book.* This is a loose-leaf book or pad made up of "ticklers," or sheets of uniform size, preferably 3 by 5 inches, which the executive carries with him at all times. Whenever he has an idea worth keeping, makes an engagement, or meets a person whose name he wants to remember, he makes a memorandum on a tickler. He uses a new slip for each item. These slips are filed as soon as convenient in their proper place in the executive's office for effective use later. For example, in the "Action at Once" folder in the deep desk drawer (soon to be described) are filed ticklers on which dictation or other immediate action is necessary.

(b) *Tickler File.* Slips for specific engagements and those which note specific times at which matters will come up for attention are put in the tickler file. This is merely a card-file box or drawer equipped with tabbed guides of the same size as the ticklers. The tabs are numbered from one to thirty-one for the days of the month, with twelve additional guides for the months of the year, and guides also for, say, five years ahead. Each tickler slip is filed back of its appropriate guide. Some executives use daily guides for two months so that their work can be planned in detail that far ahead.

Where time is not an important element, ticklers may be filed by subject. For example, the name of a person whom the executive has just met for the first time and wishes to see again may be filed behind an "Acquaintances" guide. An idea for a newspaper story will lurk behind "Publicity." A scheme for the financial campaign will be cached behind "Campaign"; then, when the campaign is being organized, all suggestions and ideas which relate to it will be found in that one place. Similarly, notations may be made regarding important books and articles to be read when (if ever) the executive has time.

An executive we know uses ticklers as an aid to remembering people. He makes notes of the names and characteristics of those he meets and later reviews these ticklers frequently. His success as an executive is doubtless due in part to his ability to remember people.

(c) *Tickler in the Office.* In addition to the tickler book already described, a supply of ticklers can be kept in the executive's desk for memoranda to be made there and immediately placed in his tickler file. Here, instead of writing the ticklers himself, he may dictate them on the dictating machine to be transcribed and filed by his secretary. The important thing is to make immediate notation of matters which may require immediate or future attention, and then to see that they are placed where they will come to mind when needed.

(d) *Tickler in Action.* The tickler file is actually a permanent memory which relieves the mind of worry about detail and frees it for creative thought. The file receives notes of everything that must be remembered and produces them on demand as the basis for planning and scheduling. The executive may plan the activities for the entire year by referring to the ticklers behind the various days and months. If he wishes to plan beyond a year, the tickler system can be extended by the addition of the necessary guide cards. For example, the date for renewing the lease for the agency's office might be filed an appropriate number of years ahead.

You may use your tickler file as the basis for planning the day's work. Take from it each morning the ticklers for the day, arrange the tasks in the proposed order of their performance, write the items on your calendar pad or daily schedule card, and allot a definite length of time, if possible, to each. The ticklers should then be returned to the file for reference on the following day. If any have not been attended to by then, include them in planning that day's work. After a while you will get so tired of writing them down that you will follow their insistent commands, just to get rid of them! Of course when the tickler slip has served its purpose you throw it away.

By the continual use of a tickler file, you may gain a reputation for infallibility which is as dangerous as it is valuable. Remember, though, to clear your pockets of ticklers when you get to your office and to consult the file each morning. On the first of the month, distribute to the proper dates the ticklers which have been collected behind the new month's guides. If you fail to do this you will be lost!

(e) *Planning and Scheduling Complicated Activities.* An essential part of effective scheduling (in which the tickler file is a great aid) is the planning, on a time basis, of every detail of a complicated activity. For example, each step in a financial campaign should be planned in advance; a plan of campaign, written out in full, is desirable. Ticklers for all these details can be filed by dates in a tickler file, or in a visible index in which the progress of campaign preparation and operation can be clearly seen. Hundreds or even thousands of activities may be necessary, depending on the size of the campaign. If a tickler system is used, all these activities can be scheduled and attended to. From the master schedule a separate schedule can be prepared for each division of the campaign, then duplicated, and finally distributed to all responsible persons.

(f) *Relate Tickler to the General File.* The tickler file may also be used in conjunction with the general file. For example, the executive may make a tickler of a letter to which he wishes to refer on a certain day, or insert under a given subject—for example, "Publicity"—a reference to a book or article which may be found in the library or in the pamphlet file of the organization.

(g) *Lists of Committee Members in Tickler File.* In addition to the ticklers already described, the executive may keep on cards in a tickler file the names of members of important committees and boards to which he needs to refer. These lists thus filed are always readily available, easily corrected, and much neater than a frequently changed manuscript list. The cards may also be used easily if it is necessary to address the lists separately (although most lists should be on addressing machine plates or stencils).

(h) *Central Tickler File.* A variation of the tickler file, as used by some organizations, is a central tickler file under the supervision of the file clerk. Into this file are put all memoranda, carbon copies of letters, and other items which require attention on a certain day. Then they are brought to the attention of the proper executive. Large governmental agencies of necessity make extensive and thoroughgoing use of the central dated tickler file. In most organizations, however, individual tickler files, kept by the executive and sub-executives or their secretaries, are adequate.

OTHER METHODS OF SCHEDULING WORK. The tickler file is not the only satisfactory way of scheduling work. Some executives use a desk calendar for that purpose. This device, however, is not always effective, for, if the work is not completed on the day scheduled for it, it may possibly be forgotten. The tickler always remains in the tickler file as a reminder until the work is completed.

Another excellent device is the "Phillips Brooks" calendar, so named because it was presumably once used by that eminent divine. This is a set of twelve cards, about 9 x 12 inches in size, one for each month of the year. Each card is divided into squares for the days, with sufficient space to write in the events of a not-too-complex day. The advantage of this calendar is that the individual can see his whole month's engagements at a glance.

The difficulty with both types of calendar is that, although they have room for scheduled engagements, they are not large enough to list all the things a busy executive has to do in a day. We personally have found much more helpful a detailed schedule, arranged by order of priorities, prepared each morning from the tickler file.

SCHEDULES ARE MADE TO BE BROKEN. The executive should not have too great a respect for his schedule. He must realize that at times it will have to be changed on short notice. Many things may occur in the course of the day which will necessitate postponing some scheduled items. This is one of the reasons why it is important for the executive to discriminate between major and minor activities. Some of the less important matters may be deferred successfully with the help of the tickler system.

CHECKING UP ON PLAN AND SCHEDULE. Part of the executive's program of accomplishment should be the assignment of a definite time each day, preferably at its close, for checking his schedule to see that nothing essential has been omitted and for looking over the next day's schedule. Daily check-ups, however, are no more important than those at longer intervals. The executive must make time in his schedule to compare the progress made each week against his plan for that week, and for each month against his month's plans. He should spend some time annually, perhaps hours or days, alone or in staff conference, planning for the year ahead. At the end of each of these periods the executive may well ask himself, "What mistakes have I made? How may I avoid them in the future? How can I do better? How can I handle problems which have arisen and are not solved?"

After the event comes the review. Results, so far as they can be determined, together with the methods by which they were attained, should be carefully analyzed. How far did the results agree with those you aimed at? Did you reach your goal? Were the methods you employed those you originally planned? Did you fail to execute your plan, or did you improve on it in the heat of action? In what respect did your methods succeed? What mistakes were made and how did they affect the result?

LIVING THE FULL LIFE. From the broader point of view, the executive should plan not only for his job but for the whole length and breadth of his life. Since he must be healthy, he must plan exercise at frequent intervals, preferably daily exercise of a kind adapted to his age, condition, and temperament. Nor must he let work and play intrude upon the full amount of sleep he needs, for rest is an essential of the vigorous life. To get his mind off his work and to give his brain, as it were, fallow ground, he must have some time for recreation and for the pursuit of a hobby. Certainly life does proceed by rhythms, and periods of work are justly followed by periods of rest and play. Furthermore, the executive must provide room in his life for full and fair attention to the demands of his family, his friends, his church, and his community relationships. The good executive usually is not the one who gives all his time to his job but the one who lives broadly as well as deeply, who gives generously of himself in many relationships other than those of his work. Work, after all, is only a means to the end of a full and integrated life.

OFFICE HOURS OF THE EXECUTIVE. The discussion of planning and scheduling for work and play brings up a question which many executives ask—whether they should conform to the office hours of the organization. They feel that, if their work continues more or less without end by day and by night, they can come to the office when they please and go when they please. That, of course, is technically true. On the other hand, the executive must remember that he is an example for his staff. His employees do not realize the time he spends out of office hours in attending meetings or in studying, thinking, and working for the organization. Overtime work is the penalty of executive responsibility. He who wishes to keep up the morale of his staff will find it desirable to be as prompt in getting to the office in the morning as he expects his staff to be. He will be just as meticulous, also, in remaining until the closing hour. If he does not at any time observe these hours, he may explain to his staff, by specific mention in staff meeting, his reasons for not being present. A staff will not work hard if it thinks the boss is loafing.

THE EXECUTIVE'S VACATION. The same punctilious attitude seems valid with respect to vacations. If the executive takes a longer vacation than his staff members, it should not be because he is the boss and can take what he wants. A longer vacation is justified only if the executive, as a result of the great demands of his job, has put in a

vast amount of additional time and energy (in excess of anyone else) for which he needs recuperation and compensation, or if he has great tasks ahead for which he should be physically, mentally, and spiritually prepared. Generally speaking, the executive's vacation should be on the same basis as that of the other professional members of the staff. In actual practice, during the past anxious, busy years of depression, war, and reconversion, we have not seen many executives who have felt they could take the full time to which they were entitled. That, again, is one of the penalties of responsibility.

ORGANIZING THE EXECUTIVE'S TIME. Practical social work executives have offered noteworthy suggestions on this matter of scheduling and planning, as follows:—

Do not let accumulate letters that are easily answered and certain matters which do not require looking up or careful consideration.

Allot a little of each day to keeping routine matters going.

Keep one day a week completely free from appointments, and if necessary stay away from the office for certain pieces of work.

Do first or promptly those things for which other staff members, committees, or subsidiary boards are waiting.

Give the other fellow a thought in scheduling individual or group conferences.

Judge what are the main conditions of your survival or failure on your job. How much time you have left over for the more interesting things depends upon how much time your community demands in reference to the fundamental services.

EXECUTIVE CARRIES PLAN WITH HIM. An executive whom we once knew scheduled his daily activities and also applied the principles of planning and scheduling to his long-time procedure. He had his plan typed in a small notebook which he carried with him at all times. Whenever he found himself alone with nothing else to do, he was likely to take out his notebook and check up as to whether he was carrying out his plan, how he might more effectively live up to it, and how it might be improved. His plan, more or less disguised, was as follows:

PLAN OF LIFE AND WORK

- A. Purpose. To become the most effective worker possible in my field, and to make the organization which employs me the most efficient instrument possible for the service for which it is intended.

B. How?

- I. Secure competent counsel.
 - a. Read all books and magazines on my own and affiliated subjects plus the life of my community.
 - b. Attend all possible conferences on these subjects.
 - c. Read and get the advice, wherever possible, of people who are experts in these subjects.
 - d. Belong to organizations in these fields.
- II. Promote experimental projects in order to develop continually better methods in my line of endeavor.
- III. Apply this information continually to improvement of the work of my organization.
- IV. Keep an adequate written record of all the ideas thus secured, suitably preserved and indexed for ready reference.
- V. Plan a well-rounded life with allowance for professional, community, and family interests.
- VI. Check up weekly, monthly, and yearly on following of plan, redirecting effort on the basis of experience.
- VII. Make experience, when significant, available for others by:
 - a. Speaking whenever possible before suitable groups.
 1. Study effective speaking.
 2. Prepare each speech carefully as to material, arrangement, and style.
 3. Practice speech when possible in advance.
 4. Hear and analyze good speaking.
 - b. Writing whenever possible for all appropriate publications, local and national.
 1. Be sure:
 - (a) Information is accurate.
 - (b) Point of view is original and fresh.
 - (c) Material is well organized.
 - (d) Style is of highest possible quality.
 2. Work out originally on dictating machine for practice in speaking.
 3. Prepare painstakingly and polish carefully.
 4. Read and analyze good writing.
 5. Teach my subject when the opportunity offers, preparing material carefully.
- VIII. Practice and improve my chosen hobby.
- IX. Keep in good physical trim.
 - a. Daily exercise.
 - b. Proper food.
 - c. Adequate sleep
- X. Keep in good mental trim.
 - a. Adequate recreation.
 - b. Refuse to worry.
 - c. Develop self-control and self-analysis.
 - d. Develop broad culture.

- XI. Have proper contact with people who count.
 - a. In my field of work.
 - b. In my community, through residence in suitable neighborhood and effective social contacts.
 - c. In the nation, by writing to leaders when occasions offer, calling on them when in their neighborhood, and entertaining them when they come to my city.
- XII. Get members of my staff to follow these principles so far as they wish to.
- XIII. Have sympathy and understanding for viewpoint and emotional reactions of others, and show it; do not be too reserved.
- XIV. Be easy and informal except when the occasion demands formality.

In these various ways, then, the executive may practice the principles of planning and scheduling—for the day, the week, the month, and the year, and even for a lifetime. Summed up, these principles mean merely the possession of an integrated philosophy of life and a sense of the significance of life and of the inter-relatedness of all its phases. The capable executive or individual will relate all that he does to his plan and philosophy. He will always try to choose the better course of action instead of the less satisfactory course. He will strive to make each interval of time see definite progress toward those goals which have been set as worthy of attainment. These goals may never be reached, because life always affords more activity than one individual can cover. Yet they are the more worth while because they keep their pursuer continually active in endeavor for attainment.

QUESTIONS

1. How would you define the term efficiency?
2. Describe some efficient individuals you have known.
3. What were the factors in their efficiency?
4. To what extent do you plan for the day, week, month, year, or longer periods?
5. How might you improve your planning?
6. What major, minor, and lateral ideals have you set for your work and your life?
7. How might they be improved?
8. How do you select the things you are to do?
9. Give some examples of schedules.

10. What do you do about scheduling your own activities?
11. How might you apply the tickler system to yourself?
12. How do you check up on the performance of your plans and schedules?
13. What time do you take for contemplation?
14. To what extent do you live a well-rounded life?
15. How could you improve your practice?
16. How do executives whom you know handle their own office hours and vacations?
17. Write out a well co-ordinated plan of action for your own life.