

Time Management Strategies for Remote Workers

When you're working remotely, the lines between productive time and wasted time can blur quickly. This course focuses on outcome-driven time management—shifting your mindset from hours logged to results delivered. Drawing on best practices and insights from a seasoned CEO, you'll explore practical techniques for structuring your day, managing distractions, and staying accountable without a traditional office environment to keep you on track. Ideal for CPAs and tax professionals managing demanding workloads from home.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 10

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LEARNING ASSIGNMENTS AND OBJECTIVES

Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Recall the characteristics of various time management platforms.

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Chapter 1: TIME MANAGEMENT: THE RESULT IS WHAT MATTERS MOST

Chapter Objective

After completing this chapter, you should be able to:

- Recall the characteristics of various time management platforms.

Time management during the crisis that causes your company to switch to remote working will be a challenge. It's a distracting period, and during work hours you will have your focus divided between your normal day-to-day responsibilities and crisis management. This will also be a difficult period with regard to time management for your team and co-workers as they muddle to find a balance in their situation of suddenly working remotely.

Proactive steps that we discussed in previous chapters will be a huge advantage in managing your time well. In this chapter, we will touch on best practices for you and your team to keep better control of your time as well as some tools you can utilize to gain some advantages toward reaching your goals.

BEING PRODUCTIVE

People discuss being productive from different perspectives. You may often hear someone say, "I've had a really productive day." By this, people usually mean that they have completed a number of tasks during the day. It can also mean to some that they have done a number of things in general. To someone who has been bedridden for an extended period due to sickness, just getting up, showering, and getting dressed on their own can be seen as a highly productive day. At the same time, to a highly active and healthy person, getting up, showering, and getting dressed would not even register on their scale of productivity. What I'm getting at is that productivity is a subjective term and there can be a disconnect in what being productive means in various situations.

When your company is flung into the situation where everyone is suddenly working remotely, it's not going to be a typical workweek, month, or quarter. The whole experience is going to skew your idea of what the current quarter and next quarter will look like for your company. You will need to develop new ways to measure productivity. You will need to train yourself to look at how people work in a different light so that you can guide them and yourself to overcoming the remote work obstacles.

Measuring Productivity

If you were managing a conveyor belt of robotic arms and other machinery, your measurement of productivity would be simple: $\text{output} \div \text{input} = \text{productivity}$. It's a formula to calculate your production processes. The input would be raw materials, the work, and the time to complete; the output would be the finished product. If you are not running an assembly line, you may not have such a direct method of measuring productivity when it comes to your business.

As we have discussed in previous chapters, simply being busy is not the same as being productive. Therefore, measurement by direct labor is oftentimes not an appropriate method of evaluation. In remote work situations, *productive procrastination* becomes a work killer. Working alone and away from your team can allow for minor tasks to become huge distractions that move your focus away from what you should be doing. If you did not have a solid established metric for measuring productivity in the office, it will be difficult to create a fair method once you hit a crisis that forces you to go remote.

There will clearly be changes in productivity. This is part of the adjustment to each individual's work environment and being separated from the team. If you were dealing with robotic arms only, putting them in a new assembly line would produce roughly the same output as in the old one. When dealing with people, however, you need to remember the human factor and be prepared to give some leeway as everyone acclimates. This includes yourself.

I spoke with Wendy O'Donovan Phillips, CEO of Denver-based company Big Buzz, about her experiences in leading her company during the shutdowns of COVID-19. I asked her what aspects of her personal management style needed to be altered in the sudden shift to suddenly working remotely. This is what she shared in response:

I am a driving, focused manager: do the task, solve the problem, finish the plan. In this day and age, I now better understand the softer side of leadership. It's important that I listen to my team, be empathetic to the challenges they are facing during this difficult time, say and do the right things to unite them and build a culture of trust. Those soft skills are actually more important than the hard skills. When people trust the organization, leadership, and each other, they produce better work.

When your crisis first hits, not seeing your team in person will cause some anxiety and trepidation about the work being produced. This will happen in most cases even if you are not one of the types who need to see people in the office in order to manage them. It's the anxiety of the crisis that will drive the feeling that you need to ensure that all of your bases are being covered. Many interviewees switched into a "nose to the grindstone" mentality. They saw the crisis as a threat to the business and its productivity. It's a natural reaction to an emergency. Many will want to eliminate any immediate threats and guard against what else may come that could cause further instability. This mindset could easily endanger the trust that you have with your team if you are not careful. Trust and your company culture will best guide you during the times when your anxiety levels are running high from crisis management. When your anxiety related to crisis management rises, think

about what you can control and shift your focus there. That will help you quantify the productivity of the team's remote workflow. You may want to use some of the simple techniques covered in the following sections that give you an added ability to maintain focus.

Objectives Focused

In Chapter 2 of course 82351B, "The Remote Workplace: Set up Your Mind and Your Space," we discussed the importance of goal setting. It helps create short-and long-term destinations to steer your work toward. To keep up productivity, make sure the team, including yourself, is aiming at specific targets each week to arrive at the place you need to be in order to accomplish your goals.

With everyone essentially working alone, they still need to be accountable to the rest of the team. The inability to be physically present with each other means that team leaders must set daily and weekly targets that help accomplish the larger goals. It is up to the leadership to see the whole picture, be aware of the objective, and keep all team members on the right paths to get there. This is where your daily check-ins can come in handy.

Check-ins and Target Adjusting

When you have your daily or weekly check-ins, leverage them to best keep up your productivity. Ask about the targets that are set and see where everyone is on their deadlines. The leader will keep track of everyone's progress with the larger objective in mind. What is very important is to get feedback. Is everyone getting what they need from other team members in order to facilitate them to reach their targets?

Best Practices

Be aware that the crisis and managing it will cause a good deal of stress on leadership. Do not allow it to endanger the bonds of trust in your team.

Hold people accountable to themselves and each other. If someone is not producing, reset the target if need be, but investigate further to see where the bottleneck is occurring. It is important for leadership to be a resource and a problem solver as opposed to being a finger pointer. See what more you can do to keep things on track. You may need to reallocate resources or redistribute some of the workload.

Again, keep in mind that the team is not working in their normal environment. Occurrences in their home, where they are now also working, may have influence on their ability to be productive. That's part of the human equation when it comes to remote working productivity. Do private, one-on-one check-ins with your team. Be empathetic and be available to listen and understand what may be going on with them and in their lives. Then, if need be, adjust the targets to empower your people to be able to meet the bigger objectives.

How you do your check-ins is a matter of personal choice and management style. The method—phone, video, chat—is less important than the time you invest. Some companies have a dedicated Slack channel just for their check-ins.

Employee evaluations are also important because they can identify the employee's strengths and where they have room for improvement. Think of aspects of the check-ins as micro evaluations. The team needs to hear where they need to refocus some energy and where they are excelling. Validating an employee's good work helps them take pride in the work they are producing and helps keep morale up. It can also establish transparency among employees' work, which can strengthen the foundation of trust.

Deadlines and Prioritizing

Deadlines, even artificial ones, are a critical tool in maintaining productivity and reaching goals when the team is distributed. The deadlines help maintain accountability and can ensure that employees reach the goals set for themselves and for the team as a whole. Use them strategically as a method to keep up productivity and manage time use.

Team Deadlines

Involve others in setting the deadlines for the remote teams on projects. Unless you are the only person who interfaces with the customer, setting attainable deadlines should include input from the group. Employees will each have different sets of knowledge and perspectives on what is needed to reach goals. Set the team up to succeed by getting their feedback and input in establishing and adjusting deadlines.

Deadlines for Yourself

It's easy to get distracted by the crisis and your new work environment. Something that I prefer to do is to create artificial deadlines for myself. When I have a firm deadline for a whole project, I often create smaller, flexible mini-deadlines to get the various pieces done. Once I put those pieces together, the rest of the project takes shape.

Time Boxing

To help me manage my time, I box out periods of the day for different tasks that have to get done that day. I make appointments with myself to work on a section of a project. When I have huge projects in front of me that may cause me to procrastinate, I will change my viewpoint to make it appear more manageable. I often envision the project as broken up into small projects. Each smaller project is far more manageable as far as my time and personal resources are concerned. I prioritize each one in the way that they impact each other so that one task leads to the next, almost like dominoes.

This allows me to stack them in order so that I can set them off for the finale when I have each block in place. I box out the time for each one, and if I don't complete one in the time I give myself, I still move on to the next piece when that next box of time comes up. I approach it like a standardized test: If I get stuck on one problem, I move on to the others and come back to the problem question at the end. This allows me to complete far more in a single day than if I allocate more time from another box to the piece that I am stuck on. As the saying goes, you can't eat an elephant all at once.

PRODUCTIVITY APPS

Productivity apps can help you manage your time, but there are many different types that focus on various elements that influence your day. I will discuss them in separate disciplines according to the strength of the particular software. Regardless of whether you are a solopreneur who runs your business on your own or the head of your company leading numerous teams, you may need a little help maintaining an edge when it comes to staying productive.

Only you can decide what parameters determine your level of productivity during your crisis. However, efficiency is a less subjective measurement. You can take definitive steps that have an observable and a measurable effect on efficiency—in other words, on how you use your time. The sudden switch to having everyone work remotely is a new experience, and the same old efficiency tactics may not work as well in a new situation. You may need an extra push to maintain efficiency and productivity. Thankfully, there are some apps for that exact need.

Calendar Apps

One of the best indicators of efficiency is how you spend your time. Spending time in a productive manner can be as simple as proper scheduling and managing your calendar. Calendar software has come a very long way since the launch of Microsoft Outlook in July 2012. Many calendar apps have features that can help you make the most of your time. Whichever app you choose, look for the system to be feature-rich and able to integrate with your email and other apps.

Best Practices

- Use your time more efficiently with calendar apps that add more automation to your day.
- Use them to remove tedious tasks that eat away at your time.

Google Calendar

If you are already using a personal or business Gmail service, the Google Calendar is going to be a safe bet for a versatile online calendar. Since many small businesses use Gmail and Google Workspace, the Google calendar is an easy system to sync with the suite of Google tools that the company is already using. The calendar is surprisingly feature-rich—surprising in that many people who have used the application for years have not utilized many of its features.

For starters, Google Calendar can sync with iCal and Outlook, so using one does not mean that you have to sacrifice the other. It makes transitioning to the cloud-based Google calendar easy. You can also easily share your Google calendar with your co-workers, which makes for efficient scheduling of group meetings via Google Meet or a conference call. It also lets others see when you may be unavailable if they are trying to get in touch with you to collaborate. You can set the calendar to show your working hours so that colleagues will know when you will not be available. Again, this is a helpful tool for collaborations and communications.

It also adds in your contacts to increase the ease of scheduling and will send you an itinerary for your day each morning. There are many extensions that can be added to Google Calendar that make your work more efficient and increase your productivity. For example, regardless of what app you use for video meetings, there is probably a Google Calendar add-on for it. This helps you to automate your scheduling by adding in the web address and any needed codes to the calendar invites that you send out for your upcoming video conferences. If you use a CRM system to track customer interactions, many of them have an add-on extension for Google Calendar to help you track communications and topics of your meetings.

Calandly

Trying to get several busy people to find a time to schedule a meeting or event that fits into everyone's calendar can be frustrating and time consuming. It can result in numerous emails and calls going back and forth that end up killing your productivity. Calandly was developed to stop that unnecessary back- and-forth to simplify scheduling.

To further enhance your productive day, Calandly can set buffers so that meetings don't run into each other should some run longer than anticipated. This also helps gives you a cushion for some prep time in between meetings. If you struggle with having too many meetings scheduled in a single day, you can add meeting caps so that you limit the number of meetings in any given day.

You can also add team pages for specific groups in your company. This is helpful for outside vendors or clients who are collaborating on the same project. It allows for invitees to meet with multiple team members at the same time and lets project managers set up meetings in a round-robin format to help maintain the workflow.

Woven

Woven is a calendar with a host of features designed for the busy professional. It aids in the ease of setting in-person meetings, conference calls, and video meetings. It adds in automation by allowing you to create templates of the event types you hold most frequently. For example, if the sales team regularly schedules an introductory meeting for new prospective clients or if the design team onboards new clients in a similar fashion each time, the team can set up a template for these

recurring events. Even if they do not occur at regular intervals or with the same people every time, it allows you to create customizable templates to reduce time wasted on repetitive tasks.

There is additional automation in the group polls for scheduling. You can set up a poll to ask when invitees may be available for a meeting, and the system will send you that info so you can determine the best time to meet. In addition, the system will analyze your overall time usage to show you where your time is being spent so you can adjust your schedules if you feel the need. It also will suggest possible times to meet based on your team members' calendars and what they have open or already booked.

Reclaim

Reclaim is a tool to help you keep your work life and personal life well-balanced by defending any time that you use regularly. The system analyzes your routines, sets them as habits, and helps you keep those habits. In this case, these are good habits to keep. Let's say that you have a regular morning workout from 7:30 to 8:30 each weekday. You can see the workout on your personal calendar, but on your shared professional calendar, you will simply be shown as unavailable to maintain your privacy.

The system also allows you to rate the importance of meetings and events. If you would like to find more time during the week to work on a specific project, its AI can help you find more time to block out by analyzing your priorities. The system can report on your team members' time and see where it may be better spent. Should it see a project of high priority and notice that a team member is spending too little time on that due to being stuck in marketing meetings, it will help reprioritize their scheduling.

Clockwise

Clockwise is a calendar app that helps you find more time to focus on work. You may be plagued by sporadic meetings that happen at odd intervals throughout the day and week. That will make it difficult to have a large block of time for focusing on one project or a single aspect of a project. Clockwise allows you to go from a fragmented schedule to one with longer focus times to help improve the quality of your work. The system allows teams to see each other's availability to collaborate. It auto-updates the team calendar from each individual's calendar. It also will analyze the team's schedules and make recommendations to help increase focus times. Clockwise syncs with Slack to let others know times when a user is unavailable. This helps eliminate interruptions and unnecessary communications during periods of deeper focus.

Lightpad

Lightpad is an innovative calendar that focuses on visual stimuli. It helps motivate the user through a linear layout and tags that are designed to stimulate your visual cortex to better plan your week.