



## TIME MANAGEMENT MATRIX JOB AID

### OBJECTIVES

This Job Aid is designed to be used to support two specific learning objectives:

-  To provide a guide for creating a list of all of the principle professional and personal, activities and tasks, which comprise your typical day, week, or month.
-  To provide a framework within which you can construct a baseline Time Management Matrix you can use to help you make choices about how to best manage your time.

### HOW TO USE THIS JOB AID

#### *Step 1: Creating a Master Task & Activities List*

Using a notepad, word processing document, spreadsheet, or other tool of your choice, create a list of all of the different types of tasks and activities – both personal and professional – which are requested or required of you in a typical day, week, month or year. You may find it helpful to develop four sub-lists under the categories of: Business, Family, Personal & Community.

Be as detailed and comprehensive as possible. The more detailed your Master Task & Activities List, the more valuable your Time Management Matrix will be in helping you develop your Weekly and Daily Plans.

Examples: Customer Visits  
Outbound Telephone Prospecting Calls  
Reading & Replying to eMail  
Writing Proposals and Sales Quotes  
Closing Contracts with Customers  
Weekly Sales Meeting  
Service Club Meeting  
Little League Practice  
Facebook & Other Personal Social Networking  
LinkedIn & Other Professional Social Networking

#### *Step 2: Seek Help Critiquing Your List*

You can complete this process in a vacuum, but it can be extremely beneficial to seek out a mentor, Coach or peer who can critique your list with you. You may want to seek input from a spouse of close personal friend to help you critique the personal elements of your list; and a Coach or business peer to help you critique the professional elements of your list.

### Step 3: Create a Master Time Management Matrix

Thinking in terms of a “typical day”, place each of the items from your Master Task & Activities List into one of the cells of the Master Time Management Matrix found below. When selecting the correct cell for an item, ask yourself the following questions:

- 🔔 How important is it that this Task or Activity be done today (Priority/Urgency)?
- 🔔 What is the potential payoff from completing this activity (Profitability/Goal Achieving)?

Examples: Making a call to a Customer to close a new sale has both a very high priority, and a very high potential payoff, so this would likely be categorized as an A1.

Placing a call to a Customer to schedule presenting a sales proposal next week has a slightly lower priority than making a call to close business today; while also maintaining a high level of potential payoff; so this may be categorized as a B1.

Attending a networking function scheduled for this afternoon has a high priority (since it can only be done today), while offering a lower potential payoff than closing a new sale; so this may be categorized as A2.

Legend: The horizontal axis (Priority/Urgency) is used to determine how important it is to complete this activity today (or tomorrow if you are planning ahead). The vertical axis (Profitability/Goal Achieving) is used to determine the relative value of this activity in terms of how its completion will move you towards achieving your goals.

- A1 – Time critical and high near-term potential profitability
- A2 – Time critical, with high potential return down the road
- A3 – Time sensitive, although they offer little in the way of goal achievement
- B1 – Need to be done, but not time critical; and offers a high potential payoff
- B2 – Not time critical, and their completion supports your goal achieving abilities
- B3 – Not time critical, and can be fit in around other higher priorities
- C1 – Low level of urgency, but offer high potential payoff over time
- C2 – Low level of urgency, but are supportive of your goal achieving abilities
- C3 – Lowest level of urgency & lowest value to you from their completion

		PRIORITY/URGENCY		
		A	B	C
PROFITABILITY/GOAL ACHIEVING	1	•••••	•••••	•••••
	2	•••••	•••••	•••••
	3	•••••	•••••	•••••

**RELATED RESOURCES**

eLearning Lesson: Time Management for the Sales Professional

Success Habit: Time Management: Developing a Plan For Success