

Planning & Scheduling Techniques for Everyday Use

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I'm always looking for professional practices I used as an Industrial Engineer - Special Projects Manager or as a Management Consultant – that may be applicable to everyday use. Now that I'm Retired, I find it fun to see if some of these techniques can be modified to make things easier (or at least more efficient), for everyday use. One of these areas of interest relates to “*planning & scheduling techniques*”.

Listed below are some general *planning & scheduling* techniques, and a brief explanation of how they might be applicable for everyday use (either separately or in some combination):

- **Do some Long Range Planning**
Important events, like attendance at weddings, graduations, vacation trips, Conferences, major birthdays, etc. – may require some long range planning, in order to make airplane & hotel reservations, schedule time off from work, and for increased family communication.
- **Include most activities in a visible schedule**
It helps to use a variety of methods to make planning & schedules visible & accessible to all that need to see them. This can be as simple as a centrally posted calendar or bulletin board of upcoming events. Sometimes it helps to have 2 or more months visible at a time, so an event at the beginning of a new month doesn't surprise anyone (when the calendar is flipped to the next month).
- **Distinguish types of activities & those most affected**
Make it easy to tell which detailed activities relate to which planned event, or who is most affected. A creative use of color ink/pencil or color post-it-notes, may help organize which activities relate to which event (or who is affected most, if not impacting the entire family).
- **Utilize previous information**
Whenever you are repeating an event, or something similar from a previous year, use that information in your planning & scheduling. This could include airline & flight routes previously used, driving routes, nearby hotels, nearby fun sites to see, days needed to be on location, etc. Accordingly, it helps if you save this information on a regular basis, maybe in trip or event folders on your Laptop Computer or Tablet.
- **Make action items lists, for complex or detailed activities**
Closer to an actual event, it may help to make a list of the sequential activities that need to be done (whether written out on paper, or typed up lists on your computer, tablet, or smart phone). This allows you to check-off completed items, and keep track of any items still needed to be completed (with the deadlines in mind).
- **Prioritize your activities, for important deadlines**
Try to use the overall schedule & end-dates, to help prioritize the most important activities, and also any long range activities that can take time to complete. This includes leaving time

for other resources to complete their tasks (such as a 3rd party, Travel Planners or Event Planners).

- **Keep visibility of completed activities**

Have some visibility on which tasks & activities, and for which planned events, have been completed (and conversely, which tasks or activities still need to be completed). This can be as simple as a ~~strike through~~ line (either in pencil on a handwritten list, or on a typed list).

- **Avoid Procrastination**

Try to minimize procrastination, particularly when starting difficult or time-consuming tasks or activities. It helps to have visibility of the end-dates for important events, to give incentive for starting important tasks on time.

- **Have some contingency plans**

It always helps, to build in some contingencies, in case things change, get behind, or are accidentally forgotten. Schedules can change for a variety of reasons (sickness, emergencies, new priorities, etc.) – so the more built-in flexibility, the better.

- **Use the best time of day, or day of week, for some activities**

Some activities can be more easily completed during certain days of the week, or times of day. As a Retiree, I often can accomplish tasks quicker by avoiding doing them on the weekends, or after 5 pm. Many businesses are less busy, during daytime hours (9 am - 3 pm), when many people are at work. Some airports and airlines are very busy during certain times of the day, or days of the week – so try to avoid these rush times, which can create significant travel delays.

- **Organize your errands**

When you are running errands on any given day, try to make it a logical & efficient driving trip. Think like a UPS driver, and mentally think about the best route to take, and the order to accomplish your errands for that day (or for that driving trip). Give priority to the most important errands first, in case you run out of time or energy. Be realistic about how much you can accomplish during one set of errands. Don't ignore weather conditions (excessive heat, or snow, or rain).

- **Make it fun**

Try not to be obsessive when doing planning & scheduling; but use it to help make things go smoothly & efficiently. A good plan or schedule usually works best (like for vacation plans), when it is almost invisible to others (or it just seems to be an easy plan to follow, that allows for a maximum amount of spontaneity & fun).