

HIGH-PERFORMANCE WORKFLOW

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THE SCHOOL LEADER'S GUIDE TO
STREAMLINING YOUR ROUTINE WORK



THE PRINCIPAL CENTER

CREATING BANDWIDTH FOR YOUR MOST IMPORTANT WORK

Workflows are the key to addressing persistent areas of overwhelm in your work. Here's why they matter, and how you can develop a workflow to keep your work under control at all times—so you can focus on the big picture.

Big priorities demand focus. You know you'll need to block off time, shut the door, and devote your full attention to certain key issues from time to time.

But what if you focus only on the big picture? Before long, you'll start to feel the consequences:

- Your inbox hits 1,000+ emails
- The piles of paper on your desk grow taller
- People start to knock on your door, asking if you've seen the note or email they sent you

Again, you haven't done anything wrong. You've been focusing on the most important projects on your agenda, and you've been focused on the people you work with.

Being organized isn't more important than making time for people and focusing on the big priorities. But it's like eating and sleeping—we can neglect it for a while, but it'll catch up with us.

Systems, Not Saturdays

One Friday, I couldn't take it any more. I'd been going flat-out for days, and my desk was a mess. Paper was everywhere. Documents covered my desk. Chart paper from our last faculty meeting covered my conference table. My bulletin board was overflowing with schedules and bulletins.

"I've GOT to get this office cleaned up!" I told myself. "I'm coming in on Saturday and I'm not leaving until it's spotless!"

So I came in Saturday and did some filing, some organizing, some cleaning, and some catching up on email. It felt good, but I'd also lost an entire Saturday to

do the things that rejuvenate me, like going on a hike with my wife. And I didn't even work on anything truly important the entire day.

Monday felt great. I had space to work, and no clutter getting in my way. But it didn't last. By Wednesday, my office was trashed again. By Thursday, I could tell I was wasting time searching through the clutter to find what I needed. And by Friday, teachers were knocking on my door to follow up on messages they assumed had—once again—fallen into a black hole.

Letting things pile up all week while I focused on my work felt like the right decision in the moment, but it wasn't working for me—and I certainly wasn't going to give up another Saturday just to tidy up. I needed a better system, and fast.

Small Decisions, On Autopilot

I realized that I needed to maintain my focus on the big picture, without falling behind on my day-to-day work, which turned out to be easier than I expected. With a few small tweaks to each of my systems for handling lower-level work, it became easier to stay caught up throughout the day, so I could make fewer decisions.

This insight—that my problem centered around decision-making—made all the difference. When I was busy and focused on serious issues, I put off the little decisions like what to do with each email—I simply couldn't spare the cognitive bandwidth.

The solution? Put those small decisions on autopilot. Stay focused on the big issues, and let habits keep me organized.

I discovered that my "to file" pile didn't actually have to be filed at all. I just got a cardboard box and put all my

“to file” documents in it. I dubbed it the “Chronological File,” and stopped using my file cabinet for 90% of my paper. I only had to dig into it a few times to retrieve documents...and since the newest documents were always on top, it turned out to be just as easy as searching through manila folders.

The habit of tossing “to file” documents in the box under my desk was effortless to maintain, and it led me to find other habits to solve the rest of my clutter problem.

The other habits—for email and other paperwork that needed my attention—weren’t as easy to figure out, but I ended up with solutions that worked just as well, and just as effortlessly on a day-to-day basis.

The result?

I could still focus on my big priorities and the people around me, yet maintain a clean desk and an empty inbox. I could keep the small stuff from slipping through the cracks, without making my day revolve around minutiae.

The Solution To Your Stress

It’s no secret that instructional leaders are stressed and overwhelmed.

Countless issues create stress and long hours. It’s the nature of the job. But when nature is harsh, what do we do? We adapt. If you want to go hiking in the snow, you don’t wear flip-flops and shorts. You equip yourself to handle the reality you’ll face. You get your snow pants and hiking boots on, and you hit the trail with confidence.

Can we adapt to something as complex and human as school leadership? I believe we can—even if every day is unique, the issues we face fall into certain patterns.

When you know what to expect, you can develop a system to handle it. Reliably. Consistently. And with less stress.

What Are Workflows?

A workflow is, in essence, a set of decisions made in advance, specifying the outcome and the process by which that outcome is achieved.

Deciding is often the hardest part—if it weren’t for the decision-making aspect, other people could do most of your tasks for you.

Here’s what we need to decide:

- Strategy—what should the outcome be?
- Tools—how will we manage the process?
- Habits—when and how will we carry out the work?

That’s the High Performance Triangle—strategy makes us effective, tools make us efficient, and habits make us consistent.

Think about any “traffic jam” you’re facing right now. Chances are the problem is that one of these three factors is the culprit.

An Example: Your Inbox

You probably get dozens or hundreds of emails a day. Do you keep up? Do you get to “inbox zero” every day?

I do, but it’s only possible because I have a workflow based on the High-Performance Triangle:

- *Strategy*—email is for communication, so nothing “lives” there.
- *Tools*—tasks go to my task app; appointments go to my calendar; info for future reference gets archived or forwarded to Evernote
- *Habits*—inbox zero once a day; keep email closed when not actively processing it.

Clutter Is Your Sign

If you want to reduce your stress and become more effective in your work as an instructional leader, think about your areas of greatest disorganization and clutter, and focus on them first. Backlogs and clutter indicate where you most urgently need to develop High-Performance Workflows. In the 16 lessons that follow, I’ll walk you through the process of developing a workflow, step by step.

Download the workflow diagram* at:
<http://www.principalcenter.com/x/hpworksheet>

*Also on page 21

INTRO

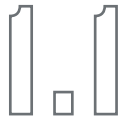
AN INSTRUCTIONAL LEADERSHIP CONUNDRUM

- Time spent on _____ activities—especially _____—is not associated with _____ student learning outcomes.
- A theory of _____ is a _____ set of _____-and-_____ relationships

EXERCISE:

Diagram your theory of action for instructional leadership—how does it impact student learning?

MODULE I



YOUR AGENDA FOR YOUR LEADERSHIP

- The Stress Equation: Stress = _____ – _____
- Parkinson's Law tells us that _____ expands to fill the available _____. In other words, we're always going to be _____—we'll never _____ time for what matters most. We must _____ it.
- Your leadership agenda is a written document that lists your current _____ and all of the things that you feel truly deserve your _____.
- Your agenda should focus on current _____, _____ issues, and _____ concerns.

EXERCISE:

Write out your prioritized leadership agenda, and draw a line to separate the issues that are allowed to cause you stress from those that aren't.

1.2

THE TRIANGLE

THREE FACTORS IN HIGH PERFORMANCE

- High performance comes from three factors:
 1. _____, which determines our _____
 2. _____, which determine our _____
 3. _____, which determine our _____
- When you aren't achieving high performance in a particular area, it's time to overhaul your system and workflow for handling that type of work.

EXERCISE:

Choose a particular area of your work that you want to improve. What are the strategies, tools, and habits you currently use? What would constitute an improvement?

OPTIMIZING FOR OUTCOMES

- A _____ is simply the process that we go through to transform an input into an _____.
- _____, procrastination, stress, and _____ are signs that you need a better workflow in a particular area.

EXERCISE:

Diagram the process you currently use for your focal workflow to transform inputs into outcomes. Example: How you handle complaints from parents, teacher observation cycles, or voicemail messages.

MODULE 2

2.1

YOUR AGENDA FOR YOUR LEADERSHIP

- We have a finite amount of mental _____ each day, which can be depleted by _____ exhaustion, low _____, _____ exertion, and repeated _____-making.
- The more _____ decisions you make each day, the less energy you'll have for the unique challenges you face.
- Anything we do out of _____ consumes far less mental energy, e.g. brushing _____.
- Organizational habits often take the form of _____, which can streamline your workflow.

EXERCISE:

Review your diagram from 1.3. What are the points in your workflow that require you to make a decision? Where do you rely on habit or policy?

2.2 ELIMINATING UNNECESSARY DECISIONS

- Every situation has some _____ aspects, but most workflows can be improved by reducing the number of _____ decisions involved.
- Three ways to eliminate ad-hoc decision-making are to use consistent _____, _____, and _____, which can be used under specific circumstances.
- A _____ is an _____ rule. Example: Always call parent while student is in the office.
- A _____ is a specific sequence of _____. Example: Process inbox from newest to oldest.
- A _____ is a flexible but specific set of behaviors and skills for achieving an outcome. Example: Listen to a parent's concern, take notes, and follow up.

EXERCISE:

Review your workflow diagram from 1.3. What are the specific policies, procedures, and practices involved? Label them as such, and indicate where you tend to make ad-hoc decisions.

2.3 HOW TO GAIN EXPERIENCE FASTER

- Workflows are processes designed to turn inputs into outcomes. Activity Theory refers to such goal-directed processes as _____.
- An activity is composed of _____, which typically require purposeful effort.
- _____ are composed of _____, which can be done with automaticity (with enough experience).
- Use the High Performance _____ to optimize each part of the workflow by clarifying the strategy, tools, and habits involved.

EXERCISE:

Revise your workflow diagram from 1.3, highlighting the key activities, actions, operations, and remaining decision points.

2.4 DEVELOPING A NEW WORKFLOW

- You can use a similar process for optimizing any workflow in your professional life.
- Signs that you might need a new workflow: _____, _____, _____, or _____
- _____ indicates that there's not a clear, easy-to-follow process in place for turning _____ into _____
- _____ indicates that issues are occupying your attention when they shouldn't be.
- _____ often comes from an inability to _____ what you want to.
- _____ is often the result of a lack of clarity about what to do next.

EXERCISE:

Identify another aspect of your work that's taking up more time than you'd like, and map it as a process. Identify the actions, operations, and decision points. Identify the strategies, tools, and habits involved, and identify ways to streamline the workflow.

MODULE 3

3.1

HIGH-LEVEL WORK IN COMPLEX SITUATIONS

- Workflows aren't just for _____ tasks; they can allow us to focus on the highest-_____ leadership actions, such as helping teachers improve.
- You can review any aspect of your leadership work to find _____ to optimize, working backwards from the _____ you want.
- First, look for _____ that can be condensed.
- Second, identify steps you can _____ to other staff.
- Third, look for steps that can be _____ or turned into _____, _____, _____, or _____.

EXERCISE:

Map out a high-level instructional leadership workflow, and identify decisions you can condense, steps you can delegate, and steps you can automate or turn into habits.

3.2 PUTTING ROUTINE WORK ON AUTOPILOT

- Three questions help us put routine work on autopilot:
- First, “_____ is this?” This is the _____ question—identify the type of situation you are dealing with, and how it’s similar to and different from other situations.
- Second, “What do I need to ____?” This is the _____-making step.
- Third, “Where does it ____?” This is an _____ question—you’re determining where to store this item and information, both while it’s being processed and when it’s done.

EXERCISE:

Identify another leadership issue you could streamline with the three questions above, and answer them: What is this, what do I need to do, and where does it go?

3.3 ORGANIZING ROUTINE WORK

- Decisions about how to _____ your work can be made once rather than _____.
- PEEP: “A _____ for Everything and Everything in its _____”
- PEEPs allow you to organize your work by the _____ you need to take
- This allows you to _____-process similar items and engage in less _____ and mode-_____.
- Leaving items in their inbox (e.g. _____) is often less effective than moving them into more specific _____-based PEEPs (e.g. “list of calls to return”)

EXERCISE:

List at least 20 places you currently keep your work. What action needs to be taken? Could any of these be condensed or turned into better action-oriented PEEPs?

3.4 BENCHMARKS AND SELF-EFFICACY

- Habits are what make us _____, and to reach specific productivity goals, we can define _____ for each habit.
- Most of your benchmarks probably need to be either _____ or _____ for getting completely caught up on whatever is in one of your specific PEEPs.
- When you're _____, you know what's on your plate, so you can _____ more effectively.
- Hitting your benchmarks also increases your sense of self-_____.

EXERCISE:

List three PEEPs that you regularly need to get "current." How often do you need to clear them out in order to stay in control of your work? Identify specific times on your calendar, e.g. "Email 4:00-4:30 daily."

3.5 MAKING YOUR CALENDAR REALISTIC

- Your _____ is your most powerful tool for taking control of your time.
- Decide in _____ how to spend your time, and adhere to your _____ unless a true emergency arises.
- Define “_____” clearly with your staff, so they know when and when not to _____ you.
- Build in time to hit your _____ regularly.
- Build in time for classroom visits—__ per day.
- Leave enough _____ time in your day to account for transitions, checking in with staff, and unforeseen issues.

EXERCISE:

Examine your benchmarks, look at your calendar and look for conflicts, and identify where you have been unrealistic. Then, make any needed changes to your weekly calendar.

MODULE 4

4.1

ERGONOMICS— THE POWER OF COMPRESSION

- As we've seen, Parkinson's Law states that _____ expands to fill the _____ available for its completion.
- We can take advantage of this principle by working within natural and artificial _____ on our time.
- When your work has been pre-organized by _____ using _____, it's much easier to quickly batch-process tasks before a hard deadline (e.g. handling all voicemails before lunch duty).

EXERCISE:

Identify 3-4 short blocks of time in your schedule that are otherwise hard to use effectively. Identify specific benchmarks you could achieve during each block.

STRATEGIES, TOOLS AND HABITS FOR EMAIL PRODUCTIVITY

- Process your email _____ to _____, organized by conversation.
- Take one of four actions with each message:
- Delete or _____ messages if no action is necessary
- _____ messages by forwarding them
- _____ tasks that will take < 2 minutes immediately
- _____ longer tasks using your calendar or to-do list
- _____ emails until a future time/date with FollowUpThen.com
- Simplify your organization scheme by using a single archive _____ or the archive button; use search if you need to find something.
- Get your inbox 100% _____ every day

EXERCISE:

Empty your inbox of all messages that you're done with by archiving them or moving them to a single folder called "archive."

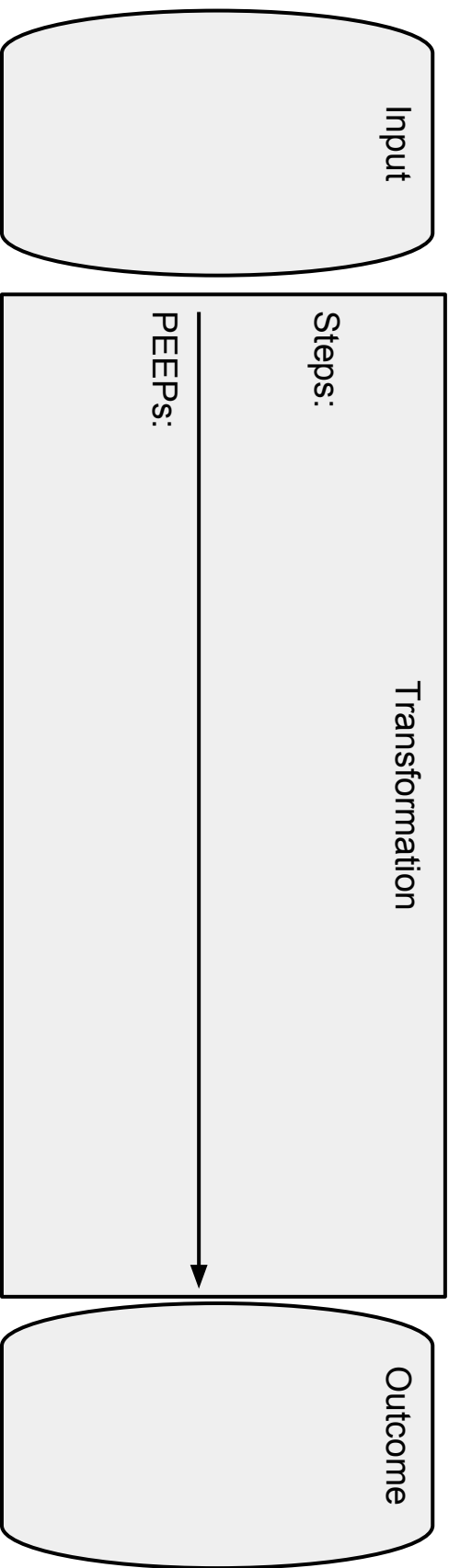
STRATEGIES, TOOLS AND HABITS FOR PAPER PRODUCTIVITY

- Consider paper a useful _____ medium, not a permanent medium for information you can store electronically instead.
- Defer paperwork using the _____ File and your calendar
- Articulate the specific _____ you need to take using Next _____
Stickies
- “Archive” documents in a single _____ File when you’re done with them
- Leave your desk 100% _____ every day

STRATEGIES, TOOLS AND HABITS FOR CLASSROOM OBSERVATIONS

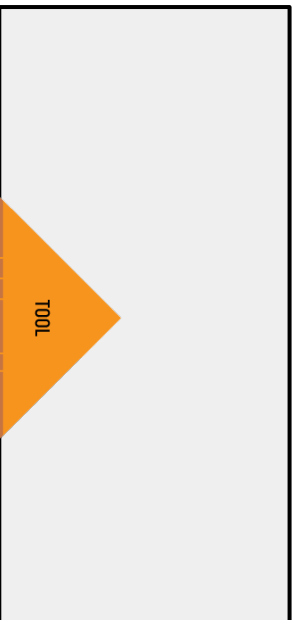
- Get into __ classrooms every day
- Take detailed _____ in a dedicated app such as Repertoire
- _____ your notes to teachers immediately, so they don't wonder what you _____
- Have a brief follow-up _____, but don't feel compelled to offer a suggestion each time
- The best feedback is _____ by the teacher about a _____ area of practice
- Take the 21-Day Instructional Leadership Challenge at <http://www.InstructionalLeadershipChallenge.com>

High-Performance Workflow Development Worksheet



Policies & Procedures:

Scheduled for:



Type:
 Ongoing Emergent Occasional

Frequency:
 High Medium Low

Urgency:
 High Medium Low

