
Planning, Organising and Delegation One Day

Duration:

Course Objective

Using a range of fun yet thought provoking and practical activities the participants will examine how to organise themselves and their workloads more effectively. The course will provide the participants with the essential tools and techniques to be more effective at planning, organising and time management, whilst gaining a deeper understanding of their personal behavioural characteristics that may help or hinder them.

By the end of the course, participants will be able to:

- 🎯 Make effective use of 'to do' lists
- 🎯 Define the difference between 'urgent' and 'important' tasks
- 🎯 Prioritise tasks in regards to their level of urgency and importance
- 🎯 Recognise the importance of planning prior to starting new tasks
- 🎯 Identify their individual traits that may hinder performance
- 🎯 Develop strategies for managing themselves more effectively
- 🎯 Identify when and how to delegate tasks appropriately
- 🎯 Apply the key principles of efficient territory management

Course Elements

Managing Time Activity

The participants will begin the day by working in small teams to complete a planning and time management activity.

Review Managing Time Activity

In this session the participants will review the results of the activity examining how effectively they gained the information they

needed to complete the task. The review will provide links to the next session where the participants will explore a framework for effective time management.

Urgent v/s Important

Participants will investigate the difference between both urgent and important tasks. They will then use the activity outcomes to define the tasks that fall into each category and determine how to deal with them once they have understood the Urgent vs. Important framework. These principles can then easily be applied to their day to day challenges.

Using 'to do' lists

The aim of this session is to highlight the importance of using a daily 'to do' list to track the achievement of both tactical and strategic tasks. The participants will examine their own 'to do lists', if they currently use one, and discuss and compare how they use them.

Unhelpful Behaviours

The participants will be introduced to a range of different thinking types and behavioural preferences that people commonly fall into. In examining some real life examples of 'the perfectionist', 'can't say no's' and the 'less structured' individuals will begin to recognise some of their own hindering traits and will talk through various strategies and new approaches to help them become more effective in planning and organising their time.

Territory Management

In this session, we cover some of the key metrics which the participants can use to self assess and drive continuous improvement

ensuring that their sales activity is enhanced by better diary management, planning and forward thinking.

Delegation in this session the participants will explore how to delegate appropriately, considering the actions they need to take before, during and after any tasks have been delegated.

Sales Manager's Journey

Now that the group are equipped with some practical tools and new approaches, they will be presented with a challenge in which they will need to plan and organise a mass of data and personnel in order to successfully achieve the task.

Reviewing the Sales Manager's Journey

The debrief of this activity will focus on the approach the group has taken, looking at what worked well and what they changes they would make in hind sight. They will recognise the need for good planning and structure when approaching tasks rather than jumping straight into the detail.

Action Planning

In this final session individuals will be invited to holistically evaluate various elements of their personal performance – they will be introduced to a tool that will help them to identify the more specific things they will need to work on in order to become more effective and efficient in their day to day planning and organising.