

Time Management: Best Practice in Clinical Research

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Objectives

- Identify common difficulties of time management
- Identify consequences of poor time management
- Describe techniques for improving time management

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Clinical Research Essentials

- Many activities clinical research staff do in their daily work are repetitive and predictable
- Specific responsibilities including multitasking
- Strong organizational skills
- Effective time management

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Time Management

- Process of organizing and planning how to divide your time between specific activities.
- Good time management enables you to work smarter – not harder – so that you get more done in less time, even when time is tight and pressures are high.
- Failing to manage your time damages your effectiveness and causes stress.

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Myth v. Fact #1

- MYTH: My time is completely controlled by external events.
- FACT: You can have control over many aspects of your time, and you alone are responsible for initiating that control.

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Myth v. Fact #2

- MYTH: I should meet everyone's expectations.
- FACT: The needs and demands of others may be inappropriate for you. Know your role and your responsibilities. Clarify your role to others, when necessary. Become clear on your needs and expectations first; consider what others expect second.

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Myth v. Fact #3

- MYTH: I should be able to do everything.
- FACT: We all have limits.... failure to acknowledge them may lead to perfectionism, which is nonproductive and a time management disaster.

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Self Assessment Exercise #1

What are your 3 biggest time management challenges?

- Too many meetings
- Interruptions from colleagues and/or patients
- Personal lack of organization
- Confused responsibilities/Role confusion
- Lack of procedures/standards for recurring tasks
- Insufficient planning or procrastination (self or team)
- Rework - correcting my own or other's mistakes
- Not knowing how to do certain required tasks
- Waiting for others to complete tasks

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Self Assessment Exercise #2

How would you describe your own time management related activities?

Select all that apply

- I effectively use "organizers" like calendars, schedules, and to-do lists
- I have a lot of "organizers", but they seem more like trouble than help
- I do tasks in priority order
- I do whatever seems the most pressing at the time
- My routine helps keep me clearly focused on my responsibilities
- I procrastinate
- I usually arrive early for meetings/clinic
- I usually arrive on time for meetings/clinic
- I'm usually late for meetings/clinic
- I have perfectionist tendencies

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Basic Principles

1. Spend time planning and organizing
2. Set Goals
3. Prioritize
4. Create a "To-Do" list
5. Be Flexible
6. Consider your biological peak time
7. Do the right thing and do it right
8. Do Urgent Tasks 1st
9. Practice Intelligent Neglect
10. Do not be a Perfectionist
11. Conquer Procrastination
12. Just say "NO"
13. Reward yourself

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Tips for Good Time Management...

- Examine current habits and identify ways to change them.
- Plan each day before it begins.
- Develop and maintain a list of specific things to be done each day. Concentrate on one thing at a time.
- Set deadlines.
- Ask for advice and use your resources.
- Be an optimist whenever possible.
- Move on after failures and learn from your mistakes.

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...Tips for Good Time Management

- Anticipate upcoming events or tasks.
- Delegate responsibilities.
- Have confidence in yourself and your ability to succeed.
- Think on paper!
- Combine similar activities, or those that use the similar resources

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Getting Started...

- Establish a list of all job-related tasks, when and how often they occur, and how long they take to complete
 - Take a week and write down all that you do every day
 - Then look at additional tasks that didn't occur in the assessment week and factor those in
- Identify standing meetings and recurring events and add them into your task assessment

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...Getting Started...

- Use your outlook calendar and fill in all the things that you do on specific days of the week and month.
 - This will allow you to clearly see the blocks of time that are not dedicated to a required activity. ***This is time that you can control!***
- Think about how you work through the day, and fill in this time with activities that are related to recurring events.
 - For example, if your clinic is Wednesday, you may want to block out several hours on Tuesday to prepare for clinic and Thursday for follow-up.

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...Getting Started

- Account for your entire 40-hour week on your calendar or spreadsheet, including time blocks dedicated to unspecified tasks and issues
 - You know that issues and needs will arise which will take you away from your expected task. However, once this issue is resolved, you can return to the task at hand
- Develop process to best organize your emails

Maintaining Effective Time Management Skills...

- Become a creature of habit.
 - Once you have established a workweek time plan that works, you will be able to attend to your responsibilities in a routine, relaxed manner.
 - You know what to expect and can control the outcome.
 - You can schedule other events or breaks in the plan with ease, as you will be intimately familiar with your day and your week.
- Get organized and stay that way.
 - Time management involves not only planning how you will use your time, but also making sure you have the supplies and resources you will need to perform your tasks.

...Maintaining Effective Time Management Skills...

- Create a comfortable, useful, and personalized workspace.
 - Organize this space with the tools and supplies you use to do your job
 - Make a habit of clearing your desk (in person or electronic) at a designated time on a regular basis. This will not only make you aware of all the documents on your desk, but also creates a sense of control. You may want to have folders or boxes for special tasks, such as a “due this week”, “clinic related”, and “projects”

...Maintaining Effective Time Management Skills

- Make lists. Whatever your method is for this, it is essential.
 - Outlook, paper lists, or electronically generated lists. Most likely you will use a combination of lists.
 - Periodically update and modify the list, rearranging priorities and removing tasks completed.
 - It is amazing how satisfying it is to cross things off your “to do” list!

Applying Time Management Skills in Clinical Research

- Know your responsibilities/tasks
- Know the responsibilities/tasks of each team member
- Delegate or return tasks to their rightful owner
- Identify tasks that are of highest and lowest value

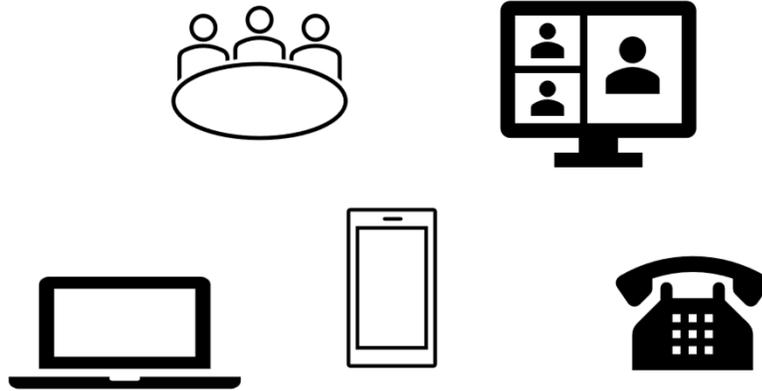
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CR Responsibilities/Tasks

- Referrals
- Screening and Eligibility
- Delegation Log
- Scheduling
- Reportable events
- Protocol specific orders
- Protocol navigation
- Protocol start up
- Participant specific clinical issues
- Forms: FMLA, SSDI, work notes, etc.
- Request for outside medical services

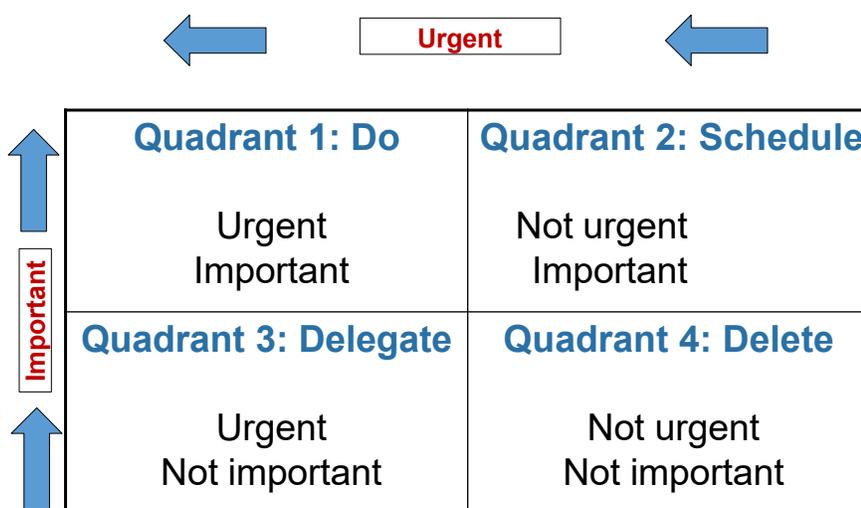
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Communication



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Time Management Matrix



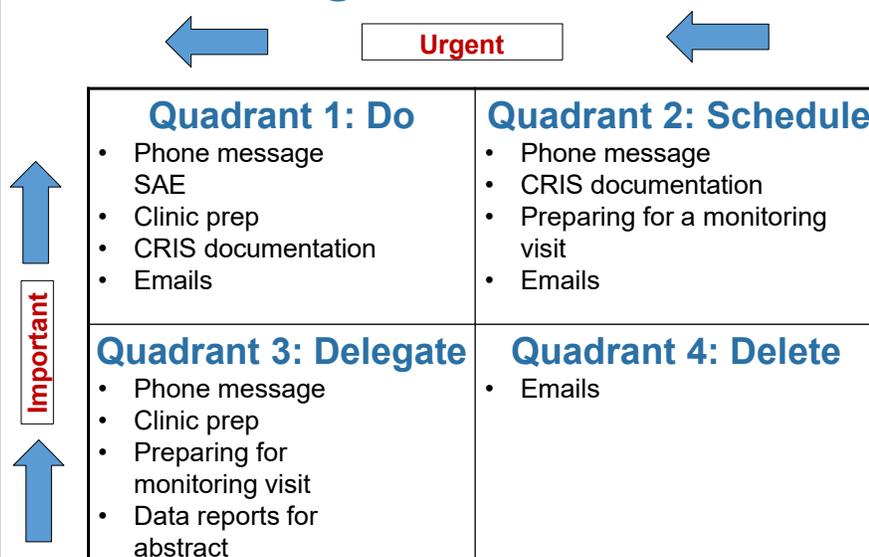
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Matrix Example: Study Coordinator

- Phone message from wife of participant that they were hospitalized the night before as well as other messages from participants and outside providers
- Clinic tomorrow (Thursday)
- Monitoring visit next week (Wednesday – Thursday)
- Data for abstract to be submitted on Friday
- Emails

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Time Management Matrix



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Managing Up

- Managing your relationship with your PI
- Developing and cultivating a productive working rapport with your PI
- Learning your PI's leadership and communication styles and preferences
- Increasing your awareness of your own work and communication style and preferences
- Adapting and aligning the work styles of you and your PI to form a productive working relationship centered around mutual growth and understanding, work productivity and career development

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Tips for Managing Up Successfully

- Get to know your PI
- Adjust your style and approach to better fit PI's preference
- Identify what frustrates your PI and avoid doing it
- Offer solutions, not problems
- Make requests, not complaints
- Keep your PI in the loop
- Own your mistakes
- Be proactive

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What other time management strategies have worked for you?

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Takeaways

- Time management is a very important strategy to be successful
 - Understand the basic concepts of time management
 - Use a few tools appropriately
- Be aware of how you use your time and try to incorporate some of the ideas discussed today into your daily routine
- Be intentional about how you spend your time
- **Consistently practice the techniques and strategies**

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Next Steps.....

- In what specific ways will you change your daily routine to achieve your goals?
- What are you already doing that you want to do more of?
- What behaviors do you want to change?

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QUESTIONS?



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