

Good afternoon  
Can be used immediately  
Before you leave today ... learn something to take away  
Positive effect, life, career, lives of those around you

**“Our lives succeed or fail gradually, then suddenly, one conversation at a time. While no single conversation is guaranteed to change the trajectory of a career, a business, a marriage, or a life, any single conversation can. The conversation is the relationship.”**

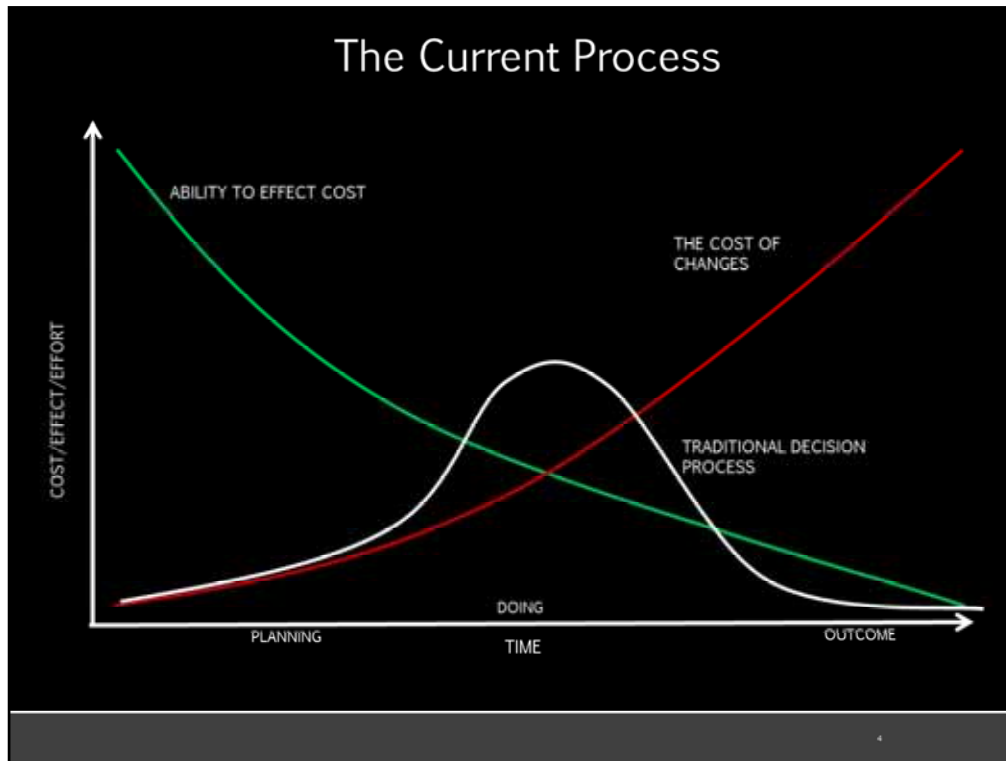
*Susan Scott*  
*“Fierce Conversations”*

The heart of personal management and success  
Communication  
Life-time earning potential

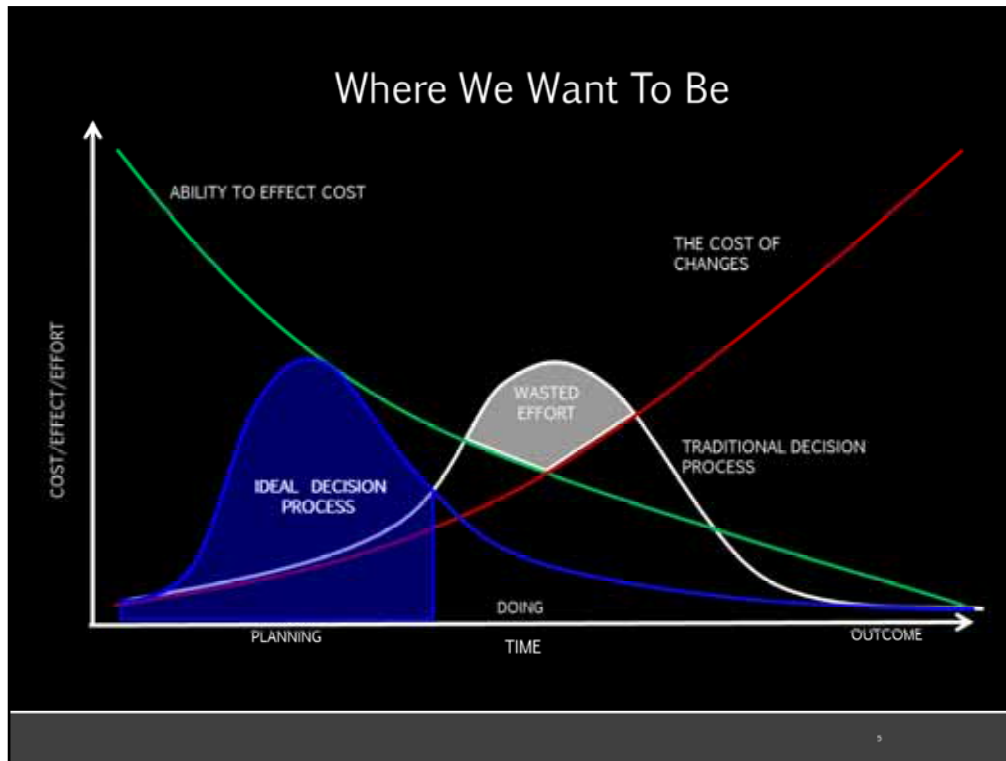
I like to start most of my sessions with this quote. It was inspired by an Ernest Hemingway novel where the protagonist was asked how did you go bankrupt – and he answered gradually then suddenly. I like it because it reminds me why we come to these events – to talk with each other and to learn. Each and everyone of us in this room is an expert at something worthy of sharing with other in our industry. I encourage you to ask questions, share stories and lessons learned with your colleagues during the Q&A at the end of this presentation and all weekend. Even negative experiences can be positive if we learn from them.

## Agenda

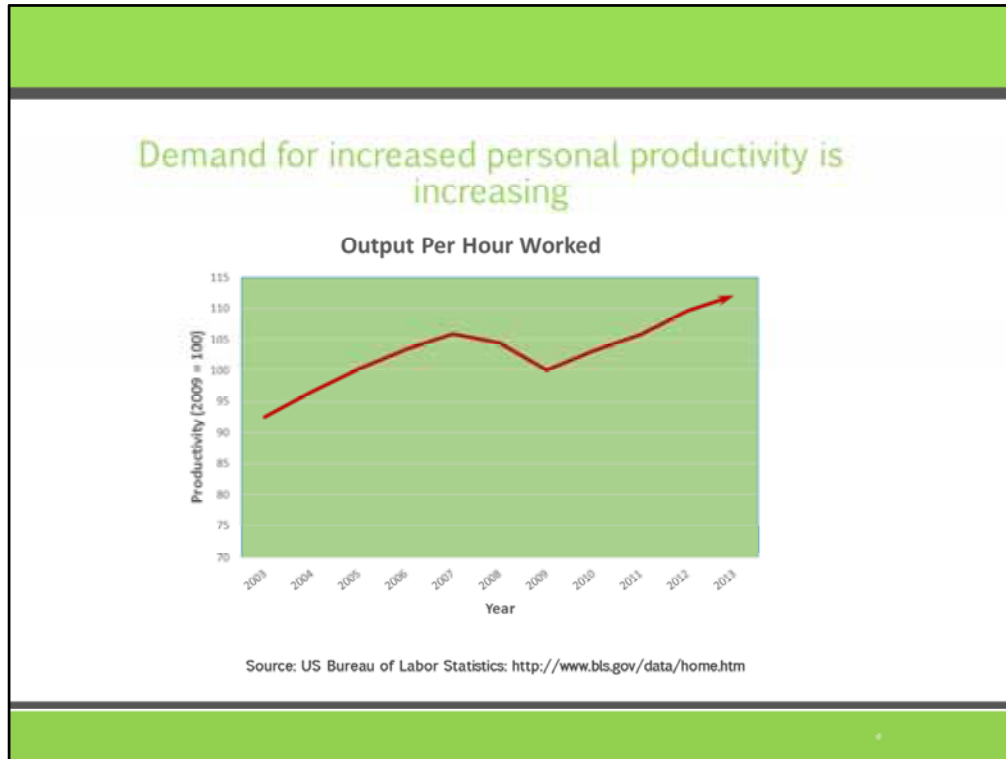
- What is an Integrated Personal Management System
- Discuss how we currently approach projects
- Discuss the fundamentals
  - Communication
  - Coordination
  - Documentation
  - Follow-up
- How can technology help



Lets look at this graphically



Fail to plan – plan to fail



Demand for ever more productivity is relentless

50% more productivity demanded than just 20 years ago

40 hours 20 years ago requires 60 hours to maintain the same or similar lifestyle

There is only one of you and only 24 hours in a day

For businesses to maintain productivity today is a struggle. The BLS indicates that a person working in the business sector must produce 50% more per hour now than we did just 20 years ago in 1987 and 20 % more than we did just 7 years ago in 2000 just to break even. For example, if you were working 60 hours per week to produce enough work to support your lifestyle in 1987 you would now have to be working 90 hours per week to maintain that same lifestyle if you still did everything the same way. How can we do that? There

is only one of you and only 24 hours in a day. We must be able to take advantage of technology to assist us in keeping track of the things we need to do in order to meet our personal goals and objectives and meet our obligations and responsibilities to our clients and the public.

Are you letting  
your beliefs  
stifle your  
productivity?



Story – Monday Morning – worked all weekend – sleep deprived  
4 projects due for 4 clients, Inbox full  
Clients do not care about other projects – hired you to produce excellence



Is technology  
making your life  
comfortable or  
crazy?



Call from major client on site  
Building official will not let them move equipment into your building  
Reluctantly get up drive 3 hours to site to sort things out  
Meantime – all other obligations go on hold

Let's take it a little further. It's still Monday morning. The week is just getting started. You're one hour into writing a specification for a 1000 ton hybrid chiller plant you've estimated will take 2 days to complete that has to be delivered to the client by 5 PM tomorrow. Then, the phone rings. It's your best client who's been providing you with high profile repeat business for 10 years. You decide to take the call. He's mad. He tells you that he's on site at his new 20 million dollar data processing center ready to take occupancy and install the 8 million dollars worth of computer systems that have to be up and running in 7 days or he will begin to lose \$100,000.00 a day in online sales. The local building official is on site. He's refusing to issue a certificate of partial occupancy and allow your client to move the computer equipment into the building. Time is not on your side. The building official is saying that none of the non-structural Components in the building are seismically restrained, and none of the fire alarm devices meet the accessibility requirements. The client is demanding you make the one hour trip to the Project site and do what ever it takes to get this situation under control. You would grab the Project file, if you could find it. Reluctantly you turnoff the computer, tell your secretary you're headed to the project from hell muttering under your breath that you just can't do this anymore. How many of you ever feel

like this?

Why are we here? Why are things not like they used to be? What has changed? Technology sure has made life a lot more complex or has it? Communication is actually the worst it has ever been in the construction industry. Things seemed to be a lot simpler before email, voice mail, faxes, PDA's, instant messaging, web cams, internet conferences, and the like.

What if we could use technology to bring order to all of this madness?



Just a little technology  
Bring order to all of this madness  
Bring story back to calm

**What if we could use technology to bring order to all of this madness?** A couple of traffic lights and a small time clock could bring a lot of sense to the madness pictured here. Back to our story. Now, picture this: It's 10 AM and [Name 2] is sitting at your desk on Monday morning. It's been a great weekend (you didn't come into the office). Spent the whole weekend with the wife and children and never once thought about work. You're feeling pretty good. Friday afternoon before you left the office at noon you had reviewed everything you need to do this week to meet your obligations and keep all of your clients happy for the coming week. You've organized and prioritized your work and filled four hours of every day with planned uninterrupted work time on your calendar with meaningful work that will move you closer to your personal and professional goals and objectives. You've checked every email in your mailbox and either answered it, deleted it, filed it in a reference system so that its impossible to lose track of and finally, checked your voice mail and scheduled time to return all calls.

# Fundamentals

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Let's look at the fundamentals – the foundation

## Four things we humans don't do well

- Communicate
- Coordinate
- Document, and
- Follow Up

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Potential to increase your lifetime learning capacity by factor of 3  
Effective communication skills  
Interpersonal communication skills  
How you handle conflict

## Master The 4C's Of Effective Communication



Everything else is a subset of Communication

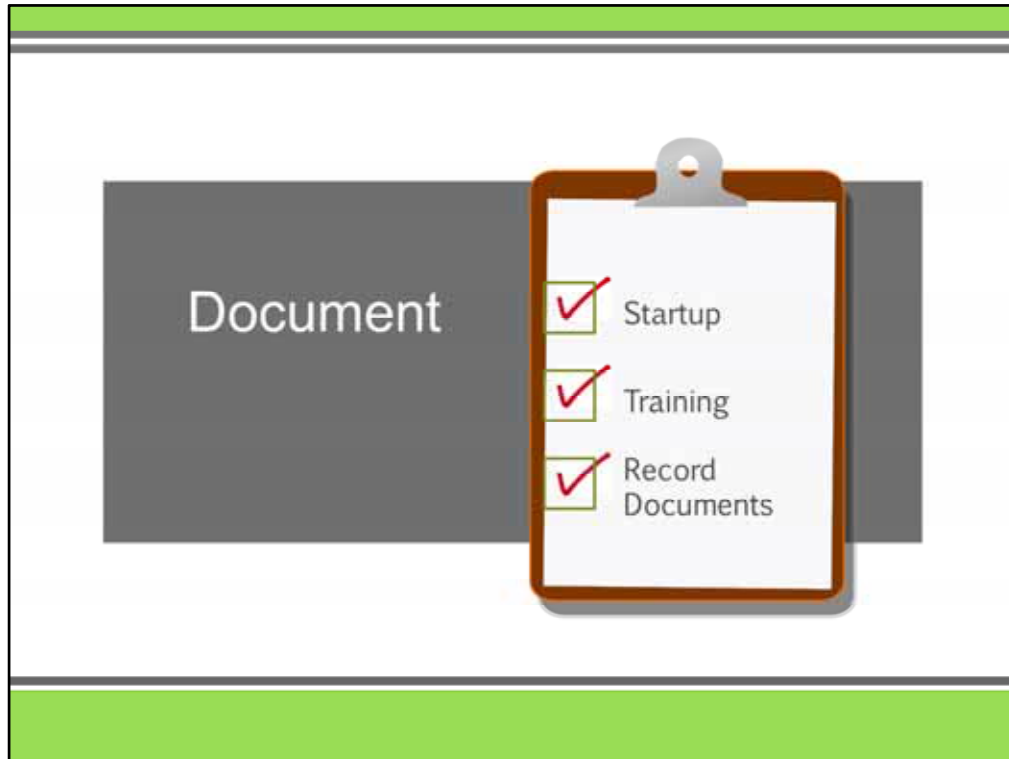
Communication is the single most important element to realizing the success of any undertaking.

Do you know what the number one cited reason for almost 100% of the civil law suits, disputes, arguments and disagreements is? A failure to communicate. In my industry we have 4 words we use to help us remember how to be better communicators. We call them the 4 C's. All communications should be clear, concise, correct and complete.

## Coordinate



If you change your mind – tell someone. If you do something that affects others or that requires someone else to do something in order for the task to be complete – tell them. I can't tell you how many times a day I encounter situations where a team members has made a decisions on a project or task, changed the way everyone agreed to do things just the day before, and never say a word.



If it is important – document it.

Transparent

Put it in writing and ask for confirmation that your recollection of the conversation and decisions made agrees with all of the other stakeholders and parties to the conversation and those affected by it.



Follow Up –  
In other words ...

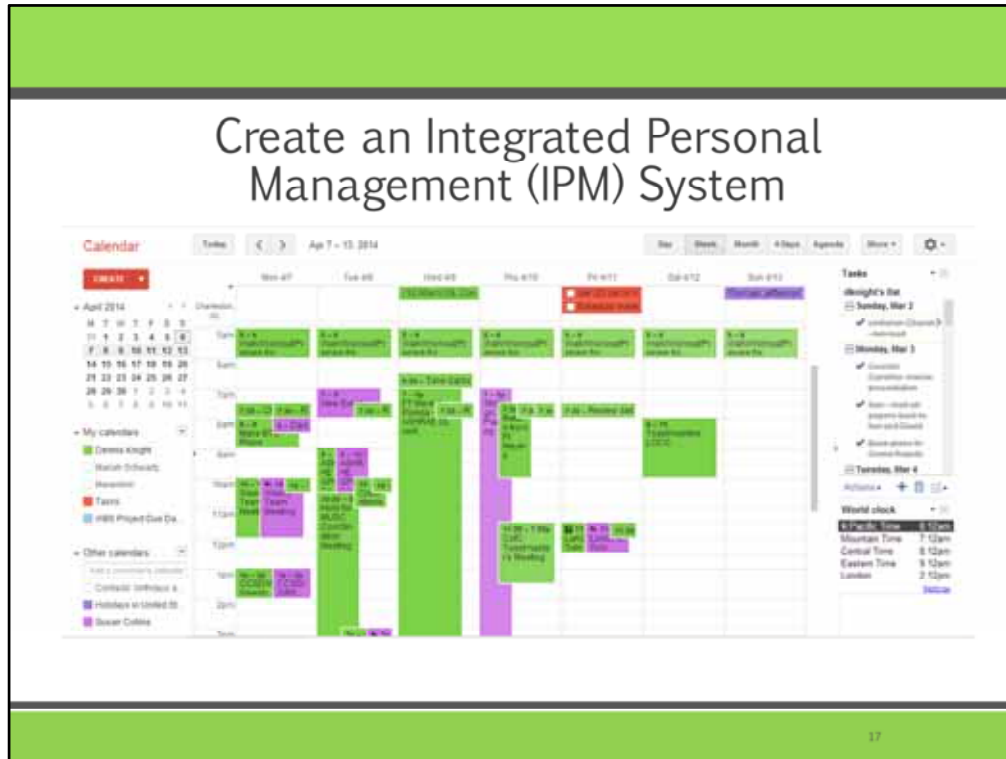


Just because you hit the send button does not mean its going to get done. Do not set yourself up for failure or in other words to not execute an agreement where you agree to be executed. Followup – if you give someone a deadline – then ask them three days, a week – whatever is appropriate amount of time – the status. Then ask again. Do not wait to the day after something was due to ask where is it – your career may depend on it. Your clients project may depend on it. Lives may depend on it.

## Creating Your System

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What's the first thing you look at in the morning at office?



**Keep everything at the Front Door with an Integrated Personal Management System.** One day [Name 1] calls [Name 2] and says – I don't know how you do it. I'm drowning over hear and your just basking in the sun on the beach. Well grasshopper says [Name2] why don't you come on over to the office for about an hour and I'll explain to you the art of stress free productivity. I'll show you how just a little disciplined organization and a little disciplined thought and a healthy dose of disciplined action will have your practice back on the course you want it to be on in no time. I call it my integrated personal management system and it's real easy to set up. You'd do that for me, a competitor. Why sure, we're both in ASHRAE together aren't we? Beside, if I can help you turn this around, give you back an hour or more each day to do the things you want to do and still meet all of your obligations, then maybe you and your client will make an honor roll investment to my ASHRAE research campaign this year. It works out to only 27 cents per day. Anyway, my next deadline is not until Wednesday afternoon and I've got plenty of unscheduled time on my calendar set aside just to deal with such emergencies.

## Laying the foundation for your IPM System

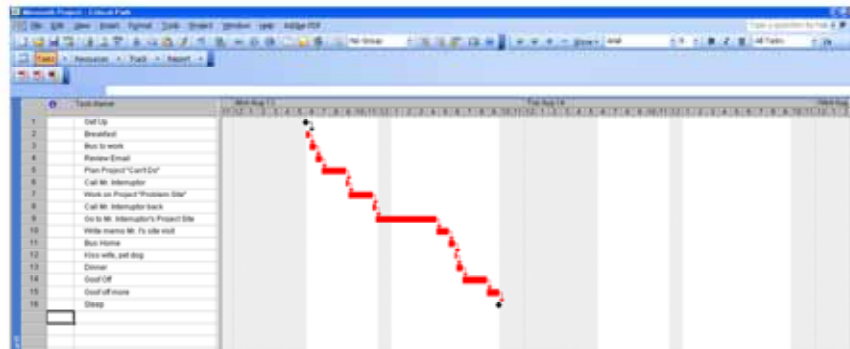


Foundation – change our thinking

Change the thinking of those around us

To begin to set up our system we must first change some of our own thinking and the thinking of those around us, we must find out exactly where we are with everything we have to do or with what is expected of us and we must empty our minds of all the unnecessary noise that is getting in the way of effective productivity and good decision making.

Every request of your time is not automatically on the critical path!



First let's reset some expectations. How many of you have heard this "come on man, you're holding me up!" (especially the subcontractors in the room) What a distraction to effective productivity. As a subcontractor that one statement became an off button to me. My first thought was "Ok, what did this moron forget to plan now, and why is he trying to blame it on me?" It was counter productive and self defeating for both of us. I immediately did not hear another thing the person on the other end of that phone line had to say. Shock and awe does not work! So the first thing we have to do is change the culture in our offices and with the people we work with. We do that by resetting expectations.

Reduce drive by  
interruptions!



I'm not saying to turn your entire work day into one big "time out." But commiserating with coworkers for a half an hour in the morning and again in the afternoon about how someone else in the office isn't doing their job is like putting yourself in the penalty box for an hour and zapping your energy and motivation. I am a believer in high quality mass collaboration. The days of the lonely genius tinkering in his laboratory coming up with the next big discovery that will change the world is almost over. Our personal creativity and success depends on collaboration and integration of many other people's ideas and work to design, construct and operate high performance buildings. So, limit needless drive by interruptions. How? Well one effective method is to just stand up when the offender enters the office. People typically will say what they have to say and move on if they aren't allowed to take a seat and get too comfortable. If you're close to the receptionist ask her to buzz in and announce that you have an important phone call or ask her to stick her head in your office and ask to speak to you. For the really difficult offenders' just say, "you know, all this commiserating is zapping my energy and getting me down, would you mind if we didn't do this anymore?" If that does not work, just fire them.

Email does not  
have to be  
replied to within  
3 minutes.

*You've Got Mail!!!!*



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Turn off that darn automatic notification. We'll talk about organizing and prioritizing email a little later, but for now, suffice it to say that every email does not demand an immediate reply or even a reply within three days for that matter. The example given in Sally's book is of FedEx and their guaranty to deliver your package within 12 hours. It's not because they can't do it faster; it's because that is what they know they can deliver consistently day in and day out. If you are using email for emergency communication you are using the wrong tool for the job.

## Sidebar – Communication Again!

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## While we are on Email

- Subject line;
- 2 minute rule;
- short message;
- no jargon or bad humor;
- use so that motivation;

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Let's talk about and focus on communication in general – remember it is the single most important skill or tool to master

## While we are on Email

- Summarize weekly meetings and agreements;
- If your recollection does not agree, let me know so that we can establish a more accurate record;
- Ask for confirmation – let me know if you have any ?'s or need more information so that you may complete your work on time;
- Write your on history;
- Set deadlines;
- Set time a to follow-up - accountable

## Preparing to communicate

- Pause and think
- Set your goals
  - Imagine the ideal outcome
- Remain calm
- Listen
- Pick the appropriate time
- Use the appropriate medium

## When to communicate and how

- Face-To-Face
  - Follow-up documentation
- Email
  - Not for emergencies
- Call
  - Follow-up documentation

## When in conflict

- Change your questions
  - From Judger to Learner
- Change the tense from
  - Past (Forensic)
  - Present (Blame and Praise)
  - Future (Choice)

## Top 12 Questions For Success

1. What do I want?
2. What are my choices?
3. What assumptions am I making?
4. What am I responsible for?
5. How else can I think about this?
6. What is the other person thinking, feeling, and wanting?

From: "Change Your Questions Change Your Life" by: Marilee Adams

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## Top 12 Questions For Success

7. What am I missing or avoiding?
8. What can I learn?
9. What action steps make the most sense?
10. What questions should I ask (myself and others)?
11. How can I turn this into win-win?
12. What's possible?"

From: "Change Your Questions Change Your Life" by: Marilee Adams

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## Back To Our System

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To begin to get a handle on the process  
Analyze your current situation  
Regain control



## Put phones on Silent or Do Not Disturb



[insert photo of phone with DND button] You do not have to take every phone call or even return every voice message immediately. Here is one little pet peeve of mine. I have caller ID on my office phone. When I see a vendor is calling me on his cell I know these are probably the first words that will come out of his or her mouth. “Hey Dennis, I’m in town and wondered if I might drop by this morning to see you and update your library.” No! - First, unless a tornado from Kansas just dropped you into the Land of Oz, Dorothy, you probably new you were coming last week. Second, this tends to send the message to me that someone else you planned to see just cancelled an appointment with you, you had no intention of coming to see me in the first place and now you are just using me to kill some time. Call me earlier next time you think you are coming to town.

Now that we’ve reset some expectations let’s move on to the next step in creating our IPMS, finding out where we are at.

Find and  
identify your  
current  
collection  
points



Dig deep here and find all those little nooks and crannies in your life where you hide little piles of things to do or jot down to-do and wish lists or where you currently store your information. Not only must you know where you are going, but you must also know where you are at before you can effectively determine how much effort it will take to get to your destination. If you have dug yourself into a hole – stop digging. For example, if you are going to Long Beach, CA you have got to know whether you are leaving from Phoenix or Charleston before you can tell someone how far you must travel. To be more relevant, to tell someone how long you think it will take you to design an HVAC system for a project it would be a good idea to know where the project is located, what type of construction, what occupancy, function, how many square feet, budget, etc. before making a guess.

Where do you  
collect things  
to do in your  
office?



[insert some pictures from around the office] Computer, phone, in basket, desk, floor, file drawers and cabinets, shelves, boss, assistant... Is your computer organized? What is your reference system? What's on your desk and can you find exactly what you need exactly when you need it?

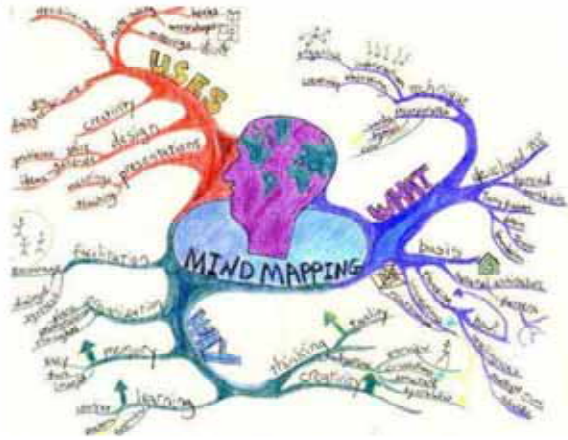
Where do you collect things to do at home?



[insert some pictures from around the house] Table by the front door, Kitchen counter/ table, dresser in bedroom, desk, Computer, car, refrigerator, wife, kids, neighbors...

Do you collect things to do in your mind?

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Clearing the  
mind, the key to  
stress free  
productivity



I can see for miles and miles. I want you to do this exercise called “clearing the mind” the first chance you get when you get back to your room this evening in front of your laptop or when you sit down at your computer Monday morning. Don’t start now though. My point is I want you at your computer and I want you to have Management Tool running. From here on out I’m going to introduce several features of Management Tool to help you create your own personalized IPMS.

Find a place to  
relax and think



Get comfortable and set aside an hour or two just to think about everything you need to do or that you think you have to do. I want you to take this seriously. You can't imagine how much better you will feel, how the stress will just melt away and your ability to focus and give attention to the really important things in your life will improve once you stop trying to keep and track everything in your head.

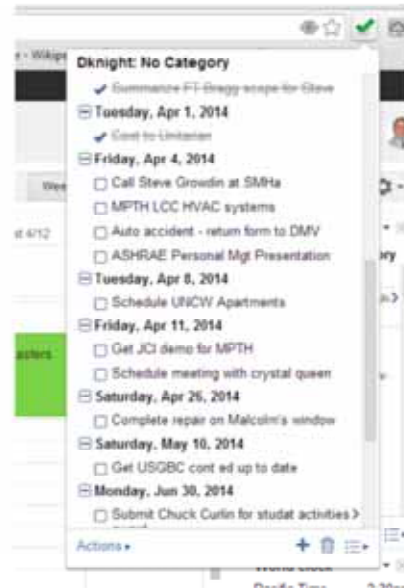
## Now, literally do a data dump



Now that you are relaxed and focused on “thinking” about all the things you have to do, just begin rattling them off in a stream of consciousness, one thing after another until you’ve exhausted every possibility of the things you have to do. If you’re having a hard getting started use some list you already have sitting around or the list of collection points you identified earlier. Here are some places to start: At the office: project lists, client lists, contact lists, think of the people in the office and ask what promises you may have made to them, do the same with clients and others; At home: Start by mentally going through every room in the house: den, living room, bedroom, bath, attic, car, garage, etc.; next just think about family, friends and neighbors and whether you’ve made some promises you need to keep, etc. Go back as far as you can and get everything out of your head and documented.

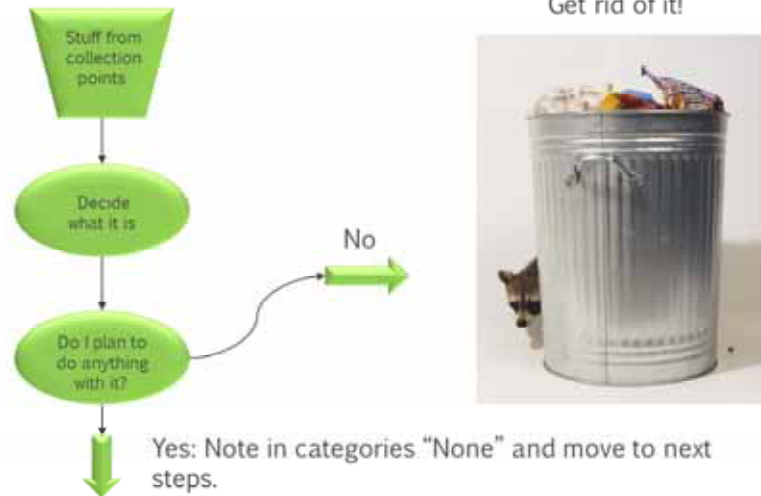


Instant memory  
upgrade:  
Categories  
“None”.



Record your list in Management Tool's task list under the Categories "None" category. Show them how.

## How to process and organize your information

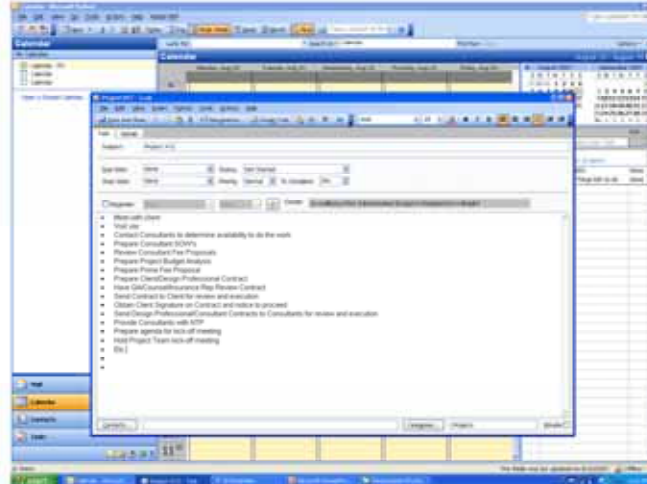


Use an Outcome based decision making process. Use the SMART model.

## Create your planning and action categories

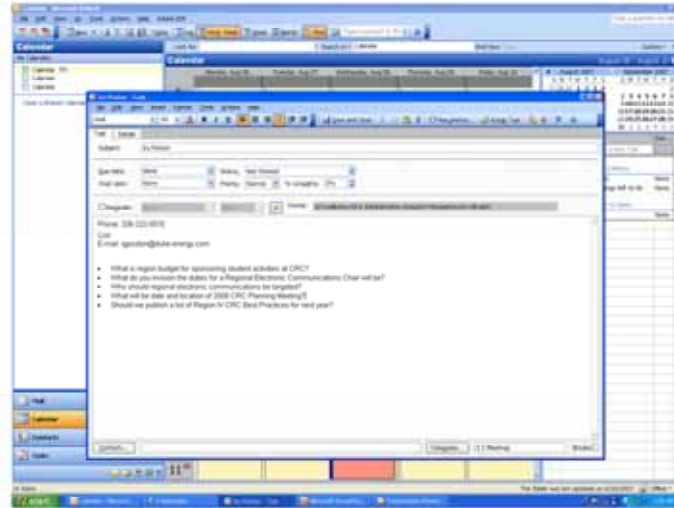
- No Category (or Category: None)
- Projects
- 1:1 Meetings
- Waiting For
- Someday Maybe

Create a category called “Projects”:



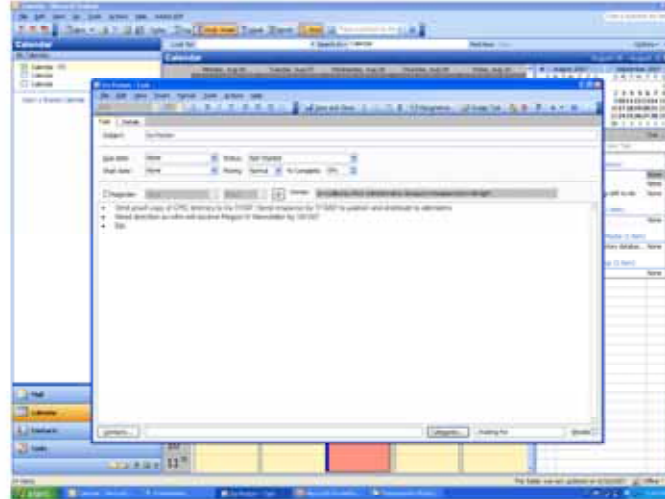
Use this category to do detailed planning and tracking of every project that has more than one subtask. For example: What a Chapter RP Chair must do throughout the year to conduct an RP campaign. {Screen Shot}

Create a category called “1:1 Meetings”:



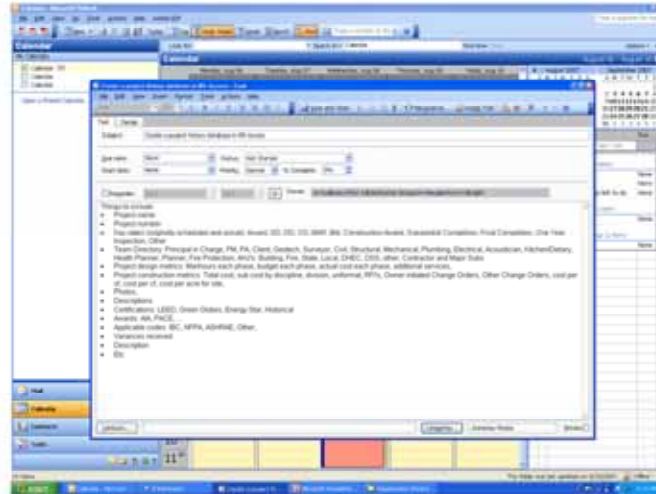
Use this category and never forget anything you need to discuss with someone else. {Screen Shot}

## Create a category called “Waiting For”:



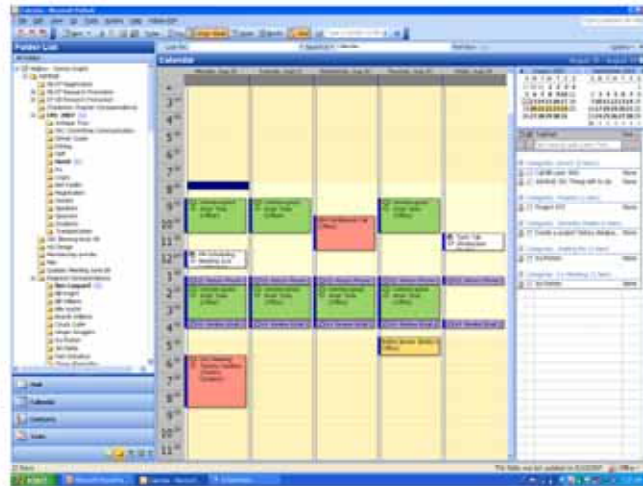
This is the category for tracking everything you’ve delegated to someone else to take care of or that has to be done by someone else before you can move your portion of the project forward.

Create a category called “Someday Maybe”:



These are the things you would like to do and do not want to forget, but are not necessary for you to do to insure your immediate success. There are many other categories that may help you create your own IPMS. I've put a list of some of the other categories I find helpful on the cheat sheet with an explanation of how I use them for you to consider.

This is your “Control Panel”:



This is the way our “Control Panel” is beginning to shape up.



Create a reference system that is  
easy to understand and access



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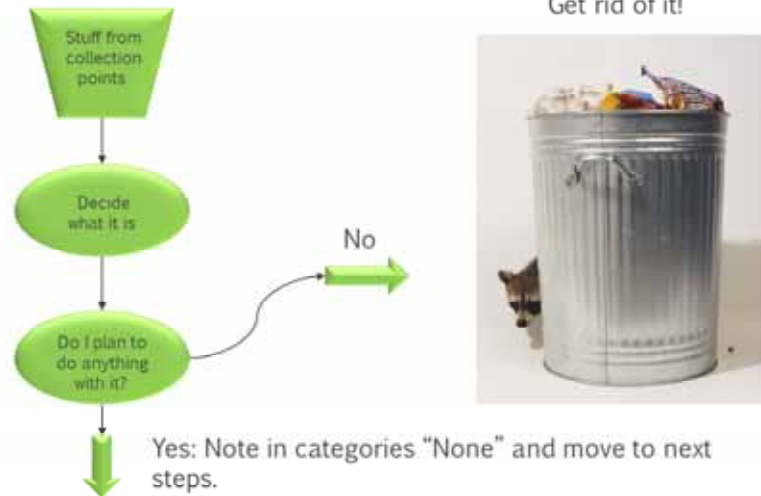
[Screen Shot of folders and favorites] File it or forget it.

Use a system that is already familiar

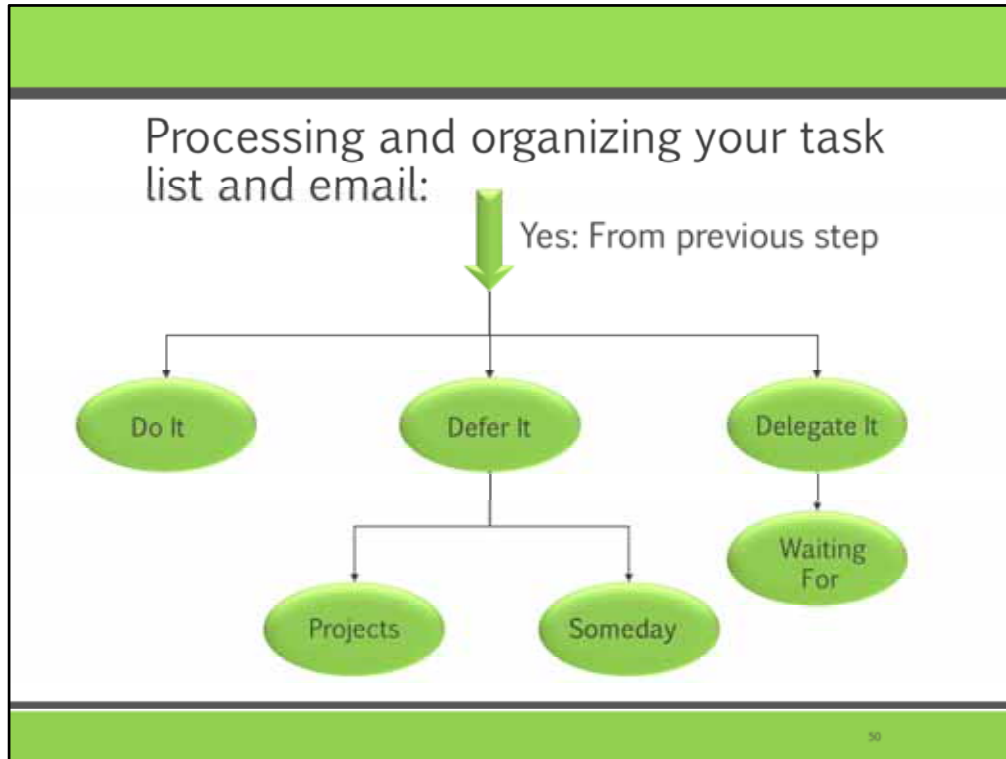


For example, alphabetical, numerical, project numbers, project names, clients, references, vendors, etc.

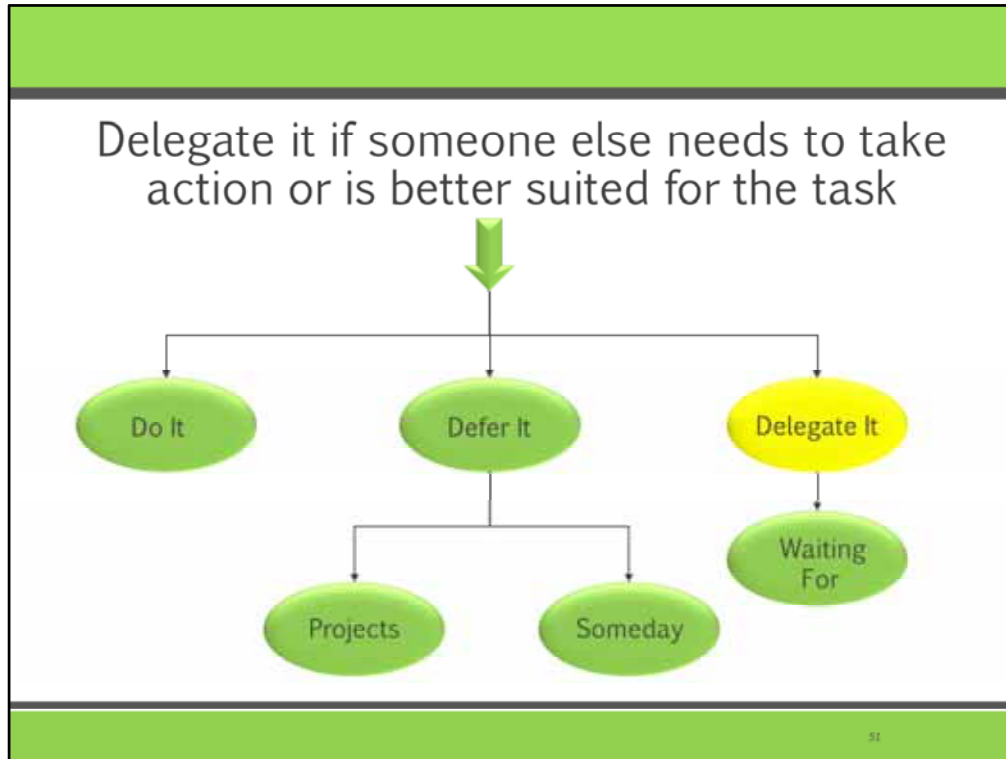
## How to process and organize your information



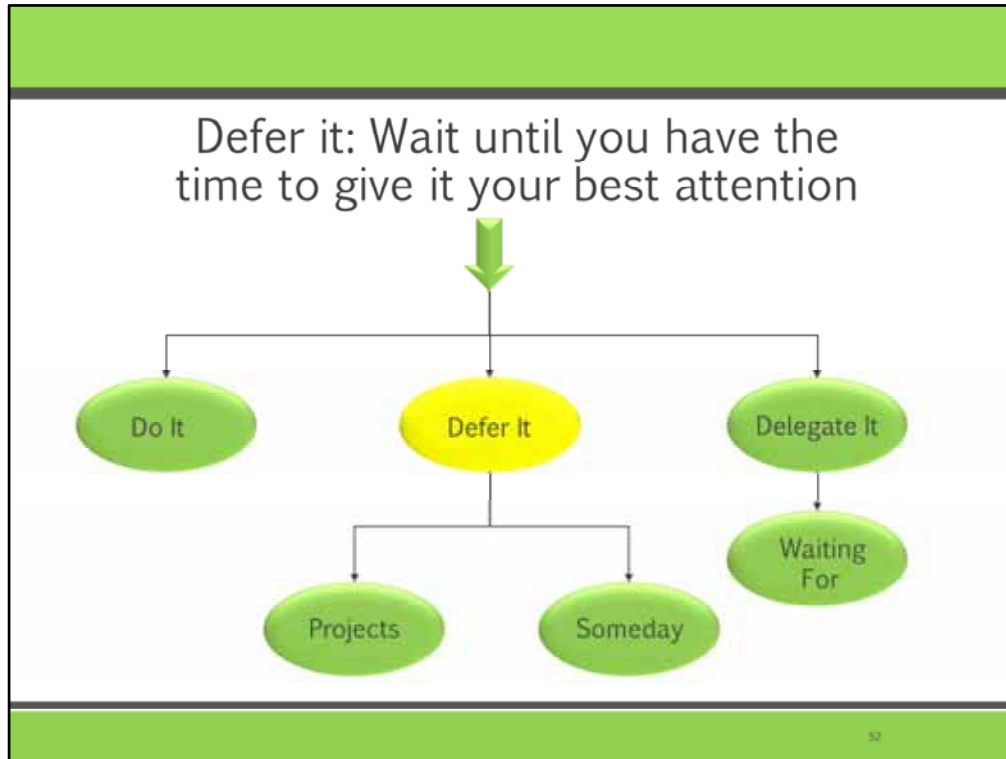
Use an Outcome based decision making process. Use the SMART model.



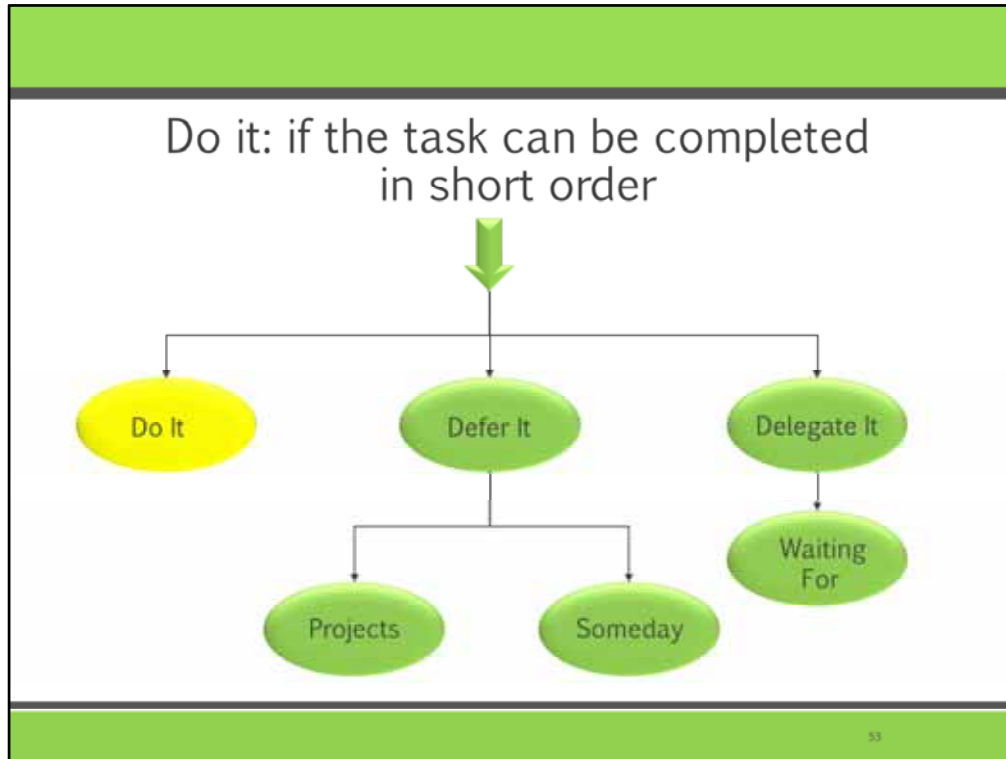
Now that we've created our categories and setup our reference system it's time to process and organize all the things we've determined we need to do. Use a common workflow model to process and organize everything you have to do. Ask yourself whether the item is something you plan to take any action on at any time now or in the future. A big part of effective productivity is making informed decisions quickly. There are only four possible choices: delete it, defer it, delegate it or do it. Paul Tuggle actually identified a fifth choice in Greenville at the planning meeting dinner – forget it. That excuse probably will not work for most of us.



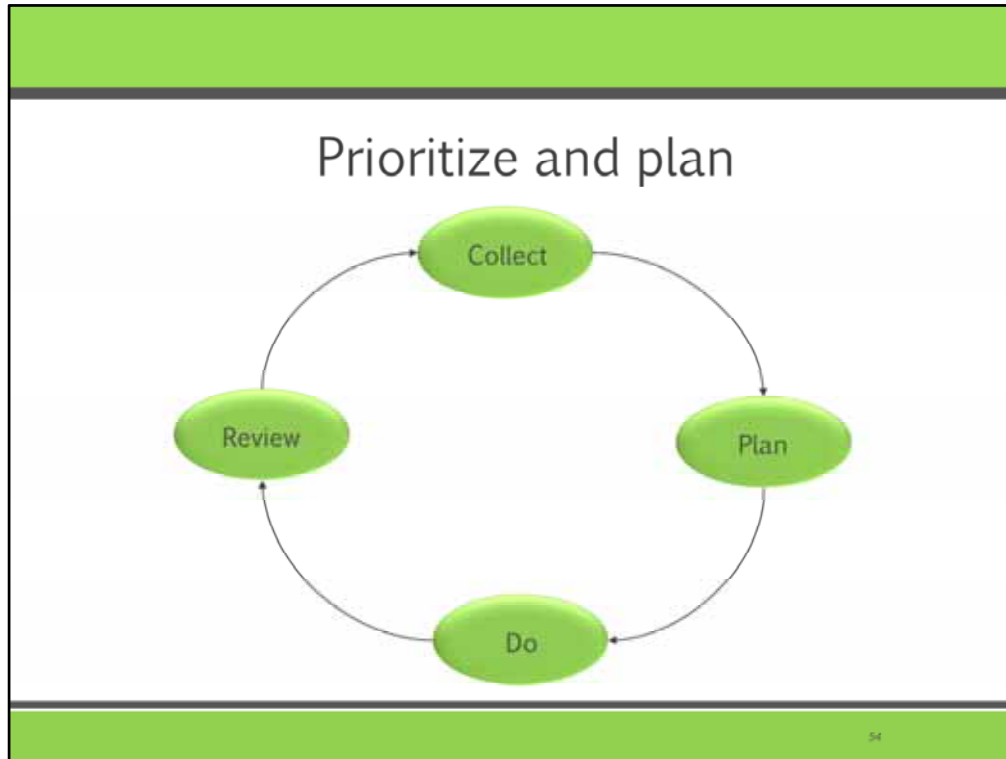
Track these items in your “Waiting For” category. [could have a photo of a football player doing a handoff] Be sure to tell the other person that you expect them to do this task. Then follow up. So often we ask someone to do something the never ask them how things are coming or if they have any questions. I end almost every email or letter with please let me know if you have any questions or need additional information so that we can complete whatever on schedule. “So that” motivation is very effective. Please complete this by next Wednesday so that I can invoice the client for the services to be able to afford to continue to pay you for working here. OK?



Record this task to categories “none” or one of your planning and action categories until you can schedule a time to complete the task.



Use the 2 minute rule. If you can complete the task or answer the question or provide the requested information in two minutes or less, just do it and move on. You will be absolutely amazed how much can be accomplished in 2 minutes.



How to prioritize and plan once all the other things are done.



## Let's Summarize

- Start your day Calendar View (key)
- Create your baseline calendar
- Use colors to evaluate use of time
- Use reminders sparingly

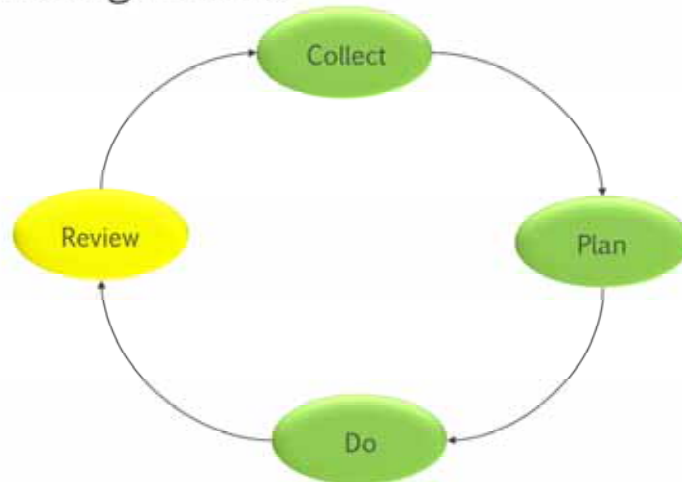
## Prioritize your tasks based outcome and expectations:

- S – Specific
- M – Measurable
- A – Achievable
- R – Relevant
- T – Time Appropriate

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. [see if I can find the “changing tires can be dangerous” video clips]

Finally, the weekly review, keeps you moving forward



We've laid our foundation, built the IPMS, now you have to maintain it. We have all seen this one in action. It doesn't take a new building long to start falling apart without a little routine maintenance. Same goes for our car, our health and well being. Perform a weekly review.

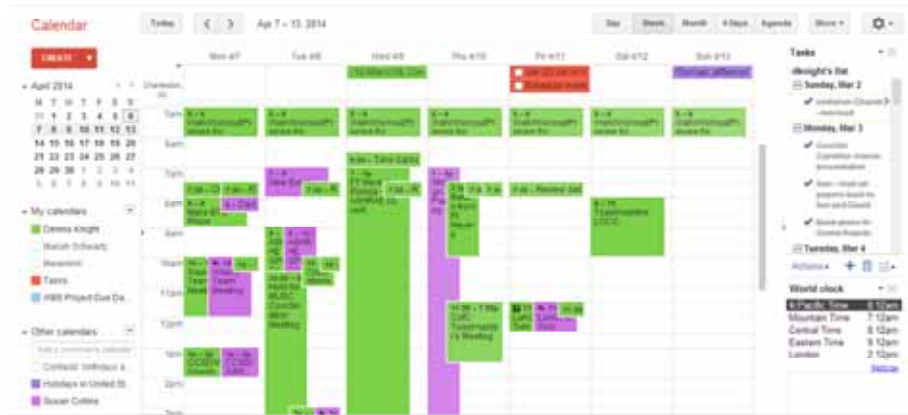
## The Weekly Review

- Move items collected in categories “None” to the appropriate planning and action categories.
- Mark everything you finished this past week as complete.
- Drag or copy things you plan to do next week into the appropriate time slot on Your Calendar.

## Wrapping Up

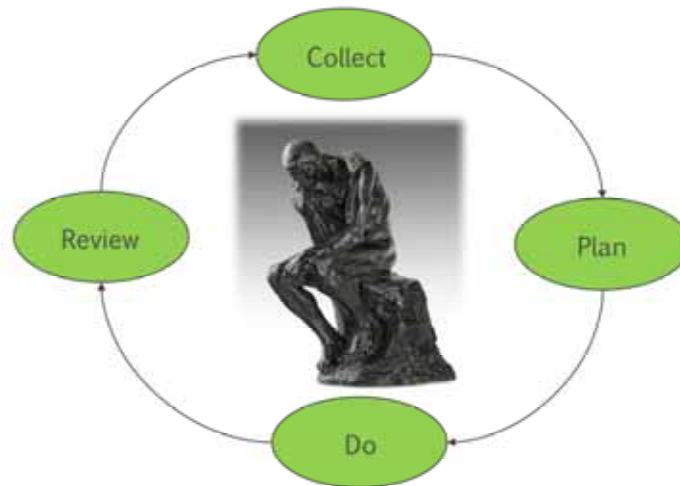
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## Disciplined organization:



Use a consistent reference system and use Management Tool for your main collection point.

## Disciplined thought:



Perform your weekly review and prioritize what you have to do.

Disciplined action:



Just do it. Stop procrastinating!



## Four things to learn to do Well

- Communicate
- Coordinate
- Document, and
- Follow Up

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Potential to increase your lifetime learning capacity by factor of 3  
Effective communication skills  
Interpersonal communication skills  
How you handle conflict

## Further Reading

- Getting Things Done, by: David Allen
- Take Back Your Life, by: Sally McGee
- Lifehacker: The Guide to Working Smarter, Faster, and Better, by: Adam Pash and Gina Trapani, <http://lifehacker.com/>
- Fierce Conversations, by: Susan Scott
- The Power of Habit, by: Charles Duhigg
- Words That Work, by: Frank Luntz
- Thanks for Arguing, by: Jay Heinrichs
- Change Your Questions, Change Your Life, by: Marilee G Adams

Just do it. Stop procrastinating!

**“The price of anything is the  
amount of life you exchange for it.”**

*Henry David Thoreau*

Use your time here on earth wisely.  
What ever you are doing at any given moment  
You've decided that is the most important thing  
You should be spending your time – consuming life - on

Who has the first question?



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Book, proposition, youngest member, presentation, 18 minutes, program chair  
promise