

# Your Controlling Calendar System

*Getting results through planning and tracking work*



SNAPSHOT

The E-Myth Mastery Program

Module 4: Foundations of E-Myth Management

Business Development Process: MG-0070

*“Next week there can’t be any crisis. My schedule is already full.”*

- Henry Kissinger, political advisor and government official

## Overview

The Controlling Calendar is a tool to plan and track your work and results, and the results that you have delegated. Unlike other calendars, it gives you a wide angle view that shows you what happened in the *past*, gives an overview of the *present*, and allows you to plan for the *future*.

The controlling calendar is easy to create and use. It’s a grid that lists work accountabilities down the side and calendar time across the top. In the boxes of the grid, you *plan* your work by writing the specific steps you must do to get the overall result. Then you *track* the work by marking steps that are done on-time and rescheduling steps that aren’t.

You and your staff should agree on a set of consistent notations to mark and update your calendars. Experiment with different formats and notations until they feel right.

## Controlling Calendar System

Controlling Calendar

Appointment Calendar

Daily Prioritizer

## Benchmarks for Implementing Your Controlling Calendar

Create your controlling calendar format

Plan work on your controlling calendar

Track your work

Create a company implementation and training plan

Implement the controlling calendar system with your employees



I’ll just toss these in the air and start with the one that lands on top!

ITEM	WEEK OF: June 2-7						WEEK OF: June 9-14					
	MON	TUES	WED	THURS	FRI	SAT	MON	TUES	WED	THURS	FRI	SAT
Awards Ceremony	Identify Awards	Research Vendors		Choose Recipients	Order Awards			Pick up Awards			Decorate Room	Conduct Awards Ceremony

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Putting the Pieces Together™

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## I've Got It under Control!

When was the last time you or anyone in your business was able to say, “I’ve got it under control,” and mean it? With so many projects that need attention and so many details to keep track of, no wonder it’s so difficult to stay on top of things.

Ask any group of managers how they plan and track their work and you’ll discover a world of to-do lists, day planners, computer software, and a lot of reliance on memory. But you won’t find any planning tool as simple – yet comprehensive – as the controlling calendar system.

Your controlling calendar system consists of three parts:

- 1. Appointment Calendar.** This is standard equipment for most business people. It’s used to record the specific date and time of appointments you’ve made.
- 2. Daily Prioritizer.** This tool helps you organize your work activities and plan your daily schedule in a way that gives you a real feeling of accomplishment at the end of each day. A model for the daily prioritizer was presented in the Managing Your Time process in Module 1: Foundations of E-Myth Leadership.
- 3. Controlling Calendar** itself, which is covered in this process. You use it to plan the sequence and timing of steps for achieving any result, and to monitor those steps over time.

Using these three pieces together, as a complete system, will give you something that most business people want, but very few have – control! Control over how you spend your day, control over your ability to do what’s most important, and even control over how others interact with you.

You know what it’s like to feel out of control. It’s draining. It’s frustrating. It can make you feel helpless.

Being *in* control feels powerful, secure, confident. It makes you feel like you’re actually getting somewhere, moving forward.

Whether its your monthly schedule of finance department activities, ongoing production, inventory management, or special project management, the controlling calendar system can be effective for you and for virtually everyone in your company. It can give you

the feeling of control that comes from managing your own work and time in a productive way. And when people are more and more in control of their efforts, your business produces better and better results.

## Your Controlling Calendar – A Tool for Managing Results

At first glance, the controlling calendar may look rather simple and unsophisticated. But don't let first impressions fool you! The controlling calendar can become your best tool for planning and organizing work because it:

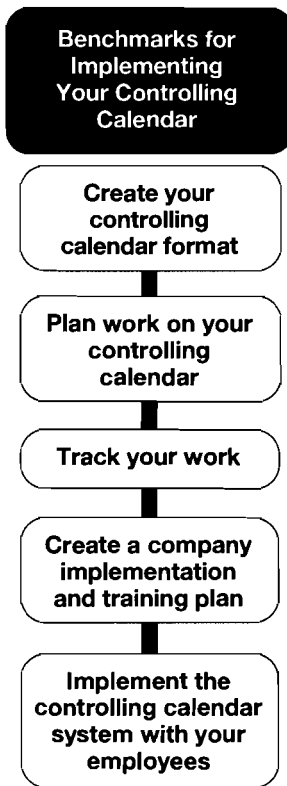
- provides a structure for planning in advance, step by step, exactly how you'll achieve your results and accomplish your accountabilities;
- gives you an immediate, at-a-glance view of the status of all work currently in progress;
- reminds you of what you have to do for other people, and what others have to do for you;
- helps you avoid conflict and overload; and
- captures the history of each project and shows you what's working – and what's not.

The controlling calendar is infinitely flexible. You can tailor it to your work, your people, the needs of your organization, and the particular ways you do business.

As you master the use of the controlling calendar to plan and track your own work, and then introduce it to your people for their use, you'll find that the controlling calendar system will become one of your company's most valuable management tools. Everyone will be able to discipline themselves to plan their commitments realistically and achieve them reliably.

Your first task, then, will be to set up your own controlling calendar, and plan and track your work on it. Take some time to get used to it and make it a habit. After you've gotten the hang of it, decide how you'll implement the controlling calendar in your business and introduce it to your people. Here's how you'll accomplish this:

**1 Create your controlling calendar format.** After reading this process to get the "big picture" of how the controlling calendar is used, decide what format will work best for you and your company. We provide several samples for you in the worksheets section. Use one or more of them as is, or adapt one



of them to better suit your own activities. Experiment with formats and notations. Have some fun with it!

**2 Plan work on your controlling calendar.** Take a look at all the work and results you're accountable for now. Choose several of these accountabilities (five to ten is a good number to start with) and list them as items on your controlling calendar in pencil. Then, plan how you'll accomplish each item by deciding the benchmarks, or steps, involved and entering them under the appropriate dates. If your benchmarks involve the work of others, remember to get their agreement regarding due dates.

Write everything on your controlling calendar in pencil. You'll find as you plan that you'll be making lots of revisions before coming up with the final version. Your controlling calendar is a great tool for thinking on paper, and it's definitely okay to change benchmarks and due dates as you think things through.

**3 Track your work.** Use your controlling calendar every day to track the progress of your work. "Notate" your calendar by checking off benchmarks that are completed on time and circling and moving benchmarks that aren't. You'll even be able to indicate whether benchmarks are missed for acceptable reasons or not. More about that later.

Tracking your work this way keeps you on top of things with very little effort. You'll be able to keep projects moving; fewer things will "slip through the cracks." You'll see real progress.

Before you leave work each day, review your controlling calendar, notate any of the day's benchmarks that you haven't already, and put each of tomorrow's benchmarks on your daily prioritizer for the next day. Feel free to let your people see you using your controlling calendar system and to talk to them about what you're doing and why.

**4 Create an implementation and training plan.** Decide how you want to use the controlling calendar system in your company and within each department or function, and then create a training and implementation plan that fits. Will you introduce this new tool individually, in group meetings, through your managers, or a combination? This is a good system in which to train managers first so that they can train the employees who report to them.

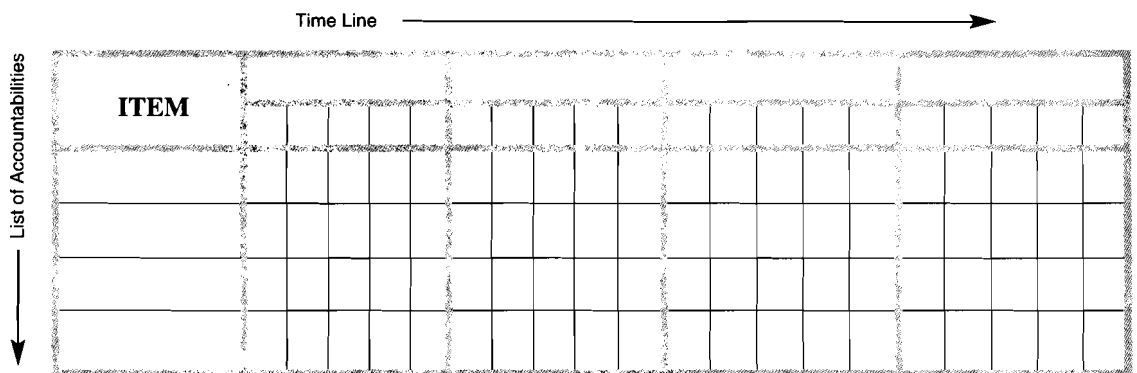
**5 Implement the controlling calendar system.** All that's left now is to implement your plan. Be sure you and your managers communicate the logic behind the controlling calendar system and how it will benefit employees. Make sure you're

clear about what policies and standards people need to follow and which may be voluntary. And, as with all your systems, don't abdicate! Follow up to see how the system is being used, provide feedback and additional training, and revise the system periodically to improve it for your company.

So let's get started building your controlling calendar.

## Formatting Your Controlling Calendar

The format for your controlling calendar is easy to create. The basic structure is a simple grid with two main components: 1) a column to list your work accountabilities and 2) a time line. Look at the different examples of controlling calendar formats in the worksheets section. See how they're structured, all with the same, familiar grid structure, but with different time lines and room for different numbers of work items. Here's a small section of one:



The *Item* column is for the names of work accountabilities, things you might usually refer to as your activities, results, projects, responsibilities, and so forth.

Most people in your company, including you, have a variety of accountabilities. But when you get right to it, all work generally falls into two categories – routine work and projects. Work that is performed regularly in a well developed sequence is routine. Approving sales reports, preparing a performance evaluation, and reviewing monthly budgets are routine accountabilities. Tasks that are performed once – or infrequently – are projects. Creating a new pay system, researching a computer purchase, or holding an awards ceremony could be examples of project work. (Of course, if you did these regularly, like every year, they could be routine.) Your controlling calendar tracks both kinds of work.

The *Item* column, therefore, will hold entries such as: “Sales Report,” “Budget Review,” “Computer Purchase,” and “Awards

Ceremony.” These names should be short, yet clear and descriptive enough so that you can easily remember what you want to accomplish. Your work items might even be customer names, which would be followed by the benchmarks you’ll perform to complete the job for each customer (see example below). If you’re working with others on one or more projects, you may want to develop a standardized set of item names.

The time line could be any length of time: a week, a month, a year, a five-day week, a six-day week, or a seven-day week. The most common format is the five-week, month-at-a-glance version shown here. The examples in the worksheets section show this model along with a variety of different time lines. Use the time line that best reflects the work patterns of your business.

ITEM	APRIL					APRIL					APRIL					APRIL							
	1	2	3	4	7	8	9	10	11	14	15	16	17	18	21	22	23	24	25	28	29	30	

Now you’re ready to choose one of the formats we’ve provided, or create your own. Don’t worry if you think the boxes look too small to write in. As you’ll soon see, you won’t be writing much! Only a brief, abbreviated, reminder of a single work step goes in a box. (Of course, changing the time line or reducing the number of work items will give you larger boxes.)

If your business uses numbers to identify projects, jobs, customers or invoices, you can add a narrow column to the left of the *Item* column to reference those numbers. Or you can use this column to prioritize work, or code it in other ways that reflect your operations.

#	ITEM	JUNE					JUNE					JUNE				
		1	2	3	4	5	8	9	10	11	12	15	16	17	18	19
24	Myers Project		1st mtg		design	client review		redesign art		redesign copy	client review			deliver >Myers		

The flexibility of your controlling calendar format is one of its best features. Hardly anything's "written in stone." It's all up to you.

## Planning Routine Work

The next step in using your controlling calendar is to start planning your work. The key to planning work effectively is to break the overall result down into a series of smaller and smaller steps, or benchmarks.

We'll start with an example of routine work. Our subject will be Joan Smith, Vice President of Marketing for XYZ Widget Works.

One of Joan's duties is to manage the sales function for her company, and one of her routine work accountabilities is to review and approve a sales report produced by Tom Smith (TS), the sales manager. Here's how the work flows:

1. Tom gathers the information about the previous week's sales activity and prepares a sales report due each Tuesday.
2. Joan reviews and approves (or disapproves) the report on Thursdays.
3. Joan returns the report with her comments to Tom on Fridays.

And here's how Joan plans it on her controlling calendar:

ITEM	JUNE					JUNE					JUNE				
	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19
Weekly Sales Report		rec < TS		appr	ret > TS		rec < TS		appr	ret > TS		rec < TS		appr	ret > TS

Joan receives the sales report from Tom every Tuesday.

Joan returns the report with her comments to Tom on Fridays.

Joan reviews and approves the report on Thursdays.

As you can see, there's no need for lengthy descriptions of what to do, just a quick reminder. Creating a set of consistent abbreviations and symbols will help everyone use their calendars easily. Use what works for you. Here are some suggestions.

Use:

- initials instead of full names;
- clear abbreviations; and
- symbols such as: > = to, < = from.

People sometimes ask, “Should I put the specific benchmarks or work of my reporting employees on my controlling calendar?” The answer is “No.”

Your controlling calendar contains tasks that you’re responsible for doing and the *results* that others have committed to do for you, not the work it takes to get those results. That’s entered onto *their* controlling calendars.

In our example, Tom’s completed sales report (the result he promised) appears on Joan’s calendar as a benchmark (“receive report from Tom”). The steps that went into producing that report are on Tom’s controlling calendar only.

## Planning Project Work

Joan is also responsible for several projects at XYZ Widget Works including the purchase of a new computer. Joan meets with Mary Black from the data processing department and Bob Green of accounting to discuss this project and delegate responsibilities. Here’s what they decided and how Joan entered the new accountabilities on her controlling calendar:

1. Mary Black will be accountable for defining the requirements of the new computer. Her report is due June 4.
2. Bob Green will be accountable for preparing a financial analysis so that Joan can determine whether XYZ Widget can afford to purchase the new computer. Bob’s report is due to Joan on June 5.
3. Joan is accountable for reviewing both Mary’s and Bob’s reports and deciding from their information whether or not to proceed with the computer purchase. She will decide by June 8.
4. If Joan decides to purchase the computer, her next step is to prepare the specifications (specs) and send them to CompuPro, their vendor, by June 10.
5. CompuPro has agreed to provide Joan with a proposal by June 17, which she can forward directly to the president.
6. Joan and the president have a meeting scheduled on June 18 to review and discuss the proposal.



ITEM	JUNE					JUNE					JUNE				
	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19
Weekly Sales Report		rec < TS		appr	ret > TS		rec < TS		appr	ret > TS		rec < TS		appr	ret > TS
Computer Proposal				specs < MB	fin < BG	dec		specs >C-PRO					prop <C-PRO	mtg w/pres	

Receive specifications report from Mary.

Receive finance report from Bob.

Decision to move forward.

Send specs to C-PRO.

Receive proposal from C-PRO.






Meet with the president.

And that's all there is to setting up a basic controlling calendar. Activities down the left side, dates across the top, and benchmarks in the boxes. Planning project work is not really different from planning your routine work, except that you'll probably have to put more thought into what each benchmark should be and when each should be due. Record all your routine and project accountabilities, use abbreviations, symbols, and descriptive item names that make sense to you, and there you have it!

## Tracking and Monitoring Your Work

The controlling calendar's value is its ability to help you plan and schedule work and results, track the progress of that work, and create a record of performance – all with the same tool. As you mark the benchmarks you and your people reach, you'll be able to see the work in both the long and short range, and to identify patterns and trends as they are developing. And as you use your

### Controlling Calendar Notations

-  = A check indicates a benchmark has been completed on or before the due date.
-  = A circle indicates a benchmark not satisfactorily completed by the scheduled date.
-  = An arrow identifies an alternate date for completion of a benchmark.
-  = A triangle pointing up indicates that a benchmark was missed, but for an acceptable reason.
-  = A triangle pointing down indicates a benchmark missed without an acceptable reason.

controlling calendars over time, they'll become a record of what you did and how it worked – lessons for your future planning.

How is all this accomplished? It's surprisingly simple. Use the notations in the box, or invent others that work better for you.

Let's return to XYZ Widget Works and see how Joan is using her controlling calendar to track the two work accountabilities that we've been looking at, the weekly review of the sales report and the proposal for the new computer.

### The Weekly Sales Report

During the first week in June, Joan checked off all the benchmarks for the sales report since each was done as planned.

During the second week, Joan did not receive the sales report on June 9 as promised. Tom asked for an extension until June 10. Joan agreed and marked the benchmark (“<TS”) with a circle and an arrow to indicate that it had been rescheduled for the 10th. (Joan could rewrite the benchmark on the 10th, for extra clarity, but chose not to in this case.) Tom submitted the report on June 10 and Joan checked it off as completed.

Tom was late with the sales report again on June 16. This time he had not requested an extension in advance, but told Joan that he had been asked to help with a project in another department and hadn’t had enough time to complete the sales report. Joan did not consider this excuse sufficient to miss the benchmark without prior notice, and marked the benchmark with a triangle pointed downward to indicate that it had been missed without a valid excuse.

ITEM	JUNE					JUNE					JUNE				
	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19
Weekly Sales Report		rec ✓ S		app ✓	ret > ✓ TS		rec < ○ TS	✓	app ✓	ret > ✓ TS		rec < △ TS	✓	appr	ret > TS
Computer Proposal				specs < MB	fin < BG	dec		specs > C-PRO					prop < C-PRO	mtg w/pres	

The two circled benchmarks on her controlling calendar were possible early signs of a trend and Joan decided to discuss this with Tom at their next Employee Development Meeting so she could give him a better idea about what constituted a valid excuse for missing a benchmark. This created an opportunity for Joan to learn about changed conditions in Tom’s area that were impacting his work load, and they were able to decide together how these new demands on Tom should be handled and how they would adjust his accountabilities.

Without the instant “history” that the controlling calendar provided, it may have been months before Joan and Tom pinpointed the impact of changed conditions on their mutual accountabilities and found new ways to deal with them. And they could have been months of disappointment, resentment, and

frustration. A manager who uses the controlling calendar as a tool for performance management as well as a master work schedule will find it invaluable in supporting his or her efforts to manage from The E-Myth Point of View.

**The Computer Proposal**

Joan now looked to her controlling calendar to review the status of the proposal for the computer purchase.

This project got off to a good start. Mary and Bob both delivered their reports on time. Joan checked them off on her calendar.

On the morning of June 8 the senior staff was called to a special meeting where they spent the day discussing a major marketing shift. Joan did not get to read and approve Mary's or Bob's reports. June 9 also held some surprises; an important customer visited the plant unexpectedly and Joan was required to host him for the day. Joan realized that she couldn't make her decision until the 10th and moved the benchmark there with another circle and arrow.

ITEM	JUNE					JUNE					JUNE				
	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19
Weekly Sales Report		rec ✓ S		app ✓	ret ✓ >TS		rec < TS	✓	app ✓	ret ✓ >TS		rec < TS	✓	appr	ret > TS
Computer Proposal				specs < MB	fin ✓ MB	dec		specs > C-PRO	✓				prop < C-PRO	mtg w/pres	

With a fresh look at her calendar, Joan realized that she wouldn't be able to mail XYZ Widget's computer specifications (specs) to CompuPro on June 10. That benchmark was then moved to June 11. Since it was unlikely that CompuPro would receive the specs before June 15, they requested an extension for their proposal to June 18. Joan will call the president to see if they should reschedule their meeting. Joan recorded all of this on her controlling calendar.

**Expanding and Advancing Your Controlling Calendar**

As time goes on, you will add new accountabilities to your calendar ("expand it") and drop old ones that have been completed. You will also have to add new dates ("advance it") as you roll through the year. Usually, you will add accountabilities as they occur on a day-to-day basis, but only add

new dates monthly (or as you approach the end of your calendar's time line). The general practice is "Advance monthly but expand as you go."

It's a good idea to store your completed controlling calendars. A periodic review of your completed calendars will let you see how you're using your time and, if necessary, make adjustments so you can better plan and manage your activities.

Here, also, will be a valuable store of "history" – a map of what worked and what didn't in the past. Planning future projects with the full benefit of hindsight can be a real advantage!

## Launching the Controlling Calendar in Your Organization

The most effective way to introduce and encourage the use of controlling calendars in your organization is to lead by example. That means you need to adopt the controlling calendar as your own. Let your people see you using it as a regular part of your daily work routine. Become completely familiar yourself with how to use it and how it helps you. This will give you time to experiment with formats and notations until you find the best combination for your business. By the time you're ready to introduce the calendar to your people, they will have had some exposure to it, and it will be a well-developed, proven system rather than an experiment.

The keys to implementing the controlling calendar are:

- 1. Train everyone in the basics.**
  - How to plan work on their calendars;
  - How to track work and results; and
  - How to expand and advance their calendars.
- 2. Review and update your calendars every day:** If you don't, you'll have to play "catch up" and you won't be getting all the value you could. On the other hand, don't get discouraged and give up on the calendar if you don't use it for a little while. Just catch up and keep on going!
- 3. Put benchmarks from your controlling calendar onto your daily prioritizer.** This is the best thing you and your people can do to ensure that the work you've planned to do actually gets done! Not only do you get a complete picture of your day, but you can even plot out an exact block of time to do each benchmark. Since Joan's controlling calendar indicates "approve sales report" and "receive specifications from Mary

Appointment Section of  
 Daily Prioritizer, June 4

HOURS	SCHEDULE
8:30	Read newspaper, business section
9:00	OPEN
9:30	Client calls
10:00	
10:30	
11:00	OPEN
11:30	Visit widget factory
12:00	Lunch
12:30	
1:00	<i>Review &amp; approve sales report</i>
1:30	OPEN
2:00	Meet with Tom
2:30	
3:00	OPEN
3:30	
4:00	Review today's sales
4:30	<i>Review Mary Black's report</i>
5:00	Plan tomorrow

Black” on June 4, the appointment section of her daily prioritizer might look like the one to the left.

You may encounter some resistance to the controlling calendar when you introduce it, but that’s natural. Some people view any change with apprehension and some people may have legitimate doubts about an unknown new tool. To others, the calendar, and the close coordination it requires between team members, may seem restrictive or confining. When your people realize that everyone will be using controlling calendars to help plan work and achieve better results – including you – and that you are holding yourself accountable for achieving your results as well as supporting theirs, they should begin to appreciate the possibilities.

Train your people in calendar formatting, planning, and scheduling and allow for flexibility wherever possible. While consistency of format helps with quick and accurate communication, some of your people will have work activities that are different from others. The calendar should feel right, and work right, for their particular positions. Listen to their suggestions about format and notations.

Pick a target date shortly after the training as the start date for use of the controlling calendar. Be prepared to help your people make it work by answering all their questions during the initial implementation.

**Responding to Potential Concerns and Objections**

Here are some common objections to the introduction of controlling calendars, and some suggested responses for dealing with them.

Objections: *The boxes are too small (or too big).  
 There aren't enough dates on it.  
 There aren't enough projects on it.*

Response: You can modify it to fit your needs. Create a format that you like better, and we'll look at it. The main thing to keep in mind is that the controlling calendar ensures that each of us will complete our work on time and that we will coordinate our work efforts with each other.

Objections: *This will make more work for me.  
 It takes longer to put it on the calendar than to do it.*

Response: As you begin to implement the controlling calendar, it will require some extra time and attention. Some work includes a routine set of benchmarks that need only be programmed into a controlling calendar once.

Objection: *I already use a software program to manage my time and results.*

Response: As you try the Controlling Calendar System, you'll discover applications and advantages over time management software. And, few software packages offer all the same benefits. The Controlling Calendar System gives you the ability to:

- Plan and track benchmarks and due dates at a glance;
- Make on-the-spot notations without having to open an electronic file;
- Readily identify patterns in performance behavior;
- Eliminate the need to toggle through screens of information;
- Size, format, and notate differently depending on each application;
- Prioritize competing commitments better; and
- Systemize complex routines and show time frames for each benchmark.

There are many applications of the Controlling Calendar System. For example, a department's "production" Controlling Calendar may be posted on a large magnet board on a central wall. Or, one Controlling Calendar may be strictly for strategic or project-based work, another for the dates of annual employee performance reviews. Each client file may have a Controlling Calendar to indicate product or service benchmarks and due dates.

Regardless of how you use it, you'll appreciate its many unique features once you've given the Controlling Calendar a try.

Objection: *I know everything that's going on.*

Response: That's great. But don't you ever worry that things are slipping through the cracks? Why burden your mind by having to remember all those little details? Using this system, others working with you will know exactly what's going on, as well.

And even if you really could easily remember absolutely everything, that doesn't help us develop the business. The controlling calendar will help you keep a record of how your work progresses so that you can evaluate and make it better. It's a beginning point for creating the systems that will move our business forward. You'll be a more valuable employee and enjoy your work more because you'll be helping us work *on* the business, not just *in* it.

Objection: *You can't plan this kind of work.*

Response: You may be right. There are some types of work that aren't appropriate for the controlling calendar, but they must meet *all three* of these criteria:

1. The work is generated or originates externally.
2. The entire accountability is essentially completed in one step or one continuous cycle.
3. There is no follow-up.

An example is a retail sales situation, where the customer comes in on his own, is helped with his purchase, and then leaves.

All other work can be planned on a controlling calendar. The controlling calendar shows our best estimate of when results will be completed. It will help us track how long it takes to complete projects. Over time, our estimates will improve. As we begin to implement the controlling calendar, we can make adjustments as needed. It's possible that some of your work won't need to go on a controlling calendar, but there probably is some work, maybe more than you realize, that should.

Objection: *It's just a management tool to restrict and control us.*

Response: The controlling calendar is a tool for everyone. It's based on management by agreement and a systemic approach for getting results. All of us, managers and non-managers, are held accountable for delivering results as planned.

## A Three-Part System for Results

The controlling calendar doesn't stand alone as a time management tool. It's one part of a three-part system for managing time and achieving results that also includes your appointment calendar and your daily prioritizer. Together they'll tell you what you have to do, what time has already been committed, and what to do now – today!

Here's how they work together. Your controlling calendar and appointment calendar both record things you've planned to do – the appointment calendar has the specific time blocked out; the controlling calendar doesn't. Your daily prioritizer takes the blocks of time you've committed from your appointment calendar, and the work you've planned from your controlling calendar, and creates a daily schedule so that nothing is forgotten and everything gets done.

**Appointment Calendar**

MONDAY		TUESDAY		WEDNESDAY		THURSDAY		FRIDAY	
8-10 Breakfast meeting	14		15		16	9-10 M. Walters	17		18
2-3:30 E. Peterson				1-3 Company Meeting		2-3 S. Harvey 3-4:30 Sales Meeting		11:45-1 Lunch w/ M. Black	

Ideally, you'll prepare your daily prioritizer before you leave work each day for the next day. Look at your appointment calendar first and enter those items that are already committed onto the daily prioritizer. Then look at your controlling calendar, find the benchmarks due tomorrow, decide exactly when you'll do them, and write them in. Ask yourself if anything else has to be done tomorrow and, if so, add it to the prioritizer, too. When you're finished, tomorrow will be planned! There will be no confusion about what to do first and you'll be able to complete what needs to be done. Every commitment and accountability, routine and non-routine, will be there. And then, if something unexpected happens, you can make a good decision about its priority, given everything else you've planned.

**The Controlling Calendar As a Management Tool**

So far, we've talked about the controlling calendar system mostly as a way for people to better manage themselves and their own work accountabilities. Teaching "self-management" skills is a great way to help people get better results.

But the controlling calendar is also a management tool, a system for managers to use to achieve one of the main accountabilities of any manager: *getting results through other people*. Here are some of the areas in which the controlling calendar can serve as an integral part of your company's management system:

**Effective planning.** When managers teach their people to plan and schedule their work, and give them the tools to do it, your business moves closer to the goal of "on time, every time, exactly as promised." Better planning leads to better results. Period.

**Delegating and regulating work.** When both manager and reporting employee are using controlling calendars, delegating and regulating work becomes much easier.

For example, you give one of your employees a delegation agreement form, indicating some work you'd like him to do. He



looks at his controlling calendar and can immediately see what other work he has leading up to the due date, and whether or not he thinks he can fit in the new delegation. And his response to the delegation request – yes, I can do it, or I can, but not by this due date – is sound and based on a realistic view of his workload.

The controlling calendar helps you regulate work in two very important ways. First, both you and your employees have the exact same understanding of when they owe you work, so they know exactly when they should be reporting results to you (in writing, of course). If their work isn't ready, they should give you an exception report with an alternate due date, which, when approved, you would both notate on your calendars.

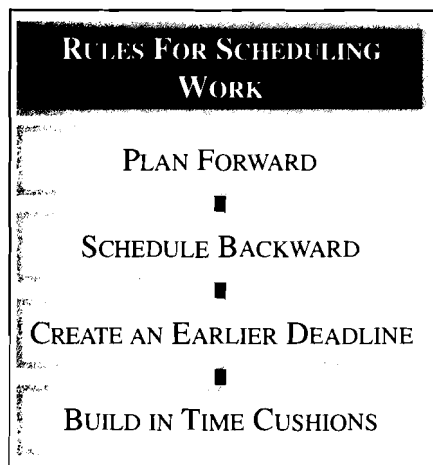
Second, managers can have their people copy and turn in their controlling calendars periodically: every week, two weeks, or month, depending on the situation. Managers can then see, at a glance, how work is progressing, if it's being planned effectively, and if there are any trouble spots that need further attention.

**Performance evaluation and coaching.** Use your controlling calendars in your ongoing employee development meetings as a basis for joint evaluation of employees' work. A trend of too many or increasing numbers of circled benchmarks, indicating work not completed when due, is a good starting point for discussion and problem solving. Use the triangle system to mark your copy of their calendars and, thereby, track below standard performance. Keeping these copies of your reporting employees' controlling calendars gives you an effective tool for evaluating their performance over time, so you can spot changes, both good and bad, and step in early with coaching and support.

**Systems development and improvement.** Has it occurred to you that as people plan the series of benchmarks toward achieving a work result, they're actually beginning to create the system for doing that work? Well, it's true!

Using controlling calendars is a great way to make everyone more aware of systems development as a regular part of their jobs. When you've got a documented system, people should plot the benchmarks onto their calendars and track them as they go. Then the calendar becomes a tool to discover where there might be problem areas in the existing system and to highlight places where the system could be improved.

## A Better Way to Plan Your Schedule



Just because you schedule something, there is no guarantee that it will actually get done on that date. Like Joan, we all have our unexpected interruptions and crises. But we can partially anticipate the unexpected (exceptions) by creating time cushions in our schedule. The controlling calendar makes this easy. Let's follow Joan as she plans her computer proposal project, but this time with a different approach to scheduling.

In any accountability, the most important due date is the final deadline. It's the one that often can't be moved. In this case, Joan needs to have the proposal on the president's desk by June 17 in preparation for their meeting on the 18th.

Joan called CompuPro and learned that it will take them three days to review her specs and prepare a proposal. They can deliver it to her on the fourth working day after they receive it.

Joan went back to her controlling calendar and applied the first principle of effective scheduling: *plan benchmarks forward, but schedule them backward.*

Joan recalled the benchmarks for this project:

1. Mary will report on the computer's requirements.
2. Bob will report on finances.
3. Joan will review the reports and decide whether or not to move forward.
4. Joan will send the specifications to CompuPro.
5. CompuPro will submit a proposal.
6. Joan will deliver the proposal to the president of XYZ Widgets and prepare for their meeting.

Scheduling backwards, Joan decided to build in a time cushion and listed her due date for CompuPro's proposal as June 15. That means that CompuPro's proposal is due that morning.

CompuPro needs three full working days so, counting backward again, Joan must deliver the specs to them early on June 10. But she wants to build in another time cushion and decides to fax the specs on the 9th, eliminating the mail delay. If something went wrong that day, she could still fax them on the 10th and maintain the rest of the schedule. This gives CompuPro a cushion, too.

ITEM	JUNE					JUNE					JUNE				
	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19
Computer Proposal (original)				specs < MB	fin < BG	dec		specs >C-PRO					prop <C-PRO	mtg w/pres	
Computer Proposal (revised)		specs < MB	fin < BG	rev reports	get input	dec	specs >C-PRO					prop <C-PRO	prop > pres	mtg w/pres	

Joan then looked at the scheduling of Mary and Bob's accountabilities. She realized that she might have to get back to them with questions about their input before she makes her decision to move forward, so she scheduled the review of Mary's and Bob's reports for June 4, and having any questions answered by the 5th. To make this happen, Joan asked Mary to submit her report on June 2 and Bob to submit his on June 3.

This schedule now has safety cushion built in, and Joan has added additional benchmarks to make sure she gets the right result. And if things go according to plan, she may even get the proposal to the president a day early (June 16)!

### A Quick Look at Some Different Formats

The controlling calendar is very flexible. Create a version that works for you. Here are some ideas for alternate formats; you'll find examples of them in the worksheets section.

**Controlling calendars with alternate timelines:** Depending on the nature of your work, you may want to create controlling calendars with different timelines. While a month is most typical, there's no reason you can't plan or track work on a weekly or yearly basis, or whatever suits your needs. The worksheets section has a variety of controlling calendar formats with different time lines: one month, one week, two weeks, multiple months, one year.

**A controlling calendar with bigger boxes:** If you need more space to write your benchmarks, reducing the number of items or choosing a shorter time line (or both) will accomplish this.

**A controlling calendar to track routine work:** If your accountabilities include a lot of routine work where you follow the same series of steps, like our earlier example of Joan's weekly review of the sales report, you may want to prepare preprinted forms that already contain the item name and benchmarks. Then

you're ready to track them as you go, once you enter the dates.

Another approach for routine work that is done in single steps is called the "dot system" and it looks like this:

ITEM	SEPTEMBER					SEPTEMBER					SEPTEMBER				
	3	4	5	6	7	10	11	12	13	14	17	18	19	20	21
Restock supplies			●					●					●		
Paper in photocopiers		✓		✓		●		●		●		●		●	
Distribute faxes	✓	✓	✓	✗	✓	●	●	●	●	●	●	●	●	●	●
Water Plants			●						●					●	

The "x" over the dot means the work was attended to but didn't need to be done.

**A controlling calendar for individual projects:** Sometimes you may want to see one or two projects by themselves, uncluttered by benchmarks and tracking notations of other, unrelated work. You can create a controlling calendar with just one or two item rows. Or use the "multiple months" example in the worksheets section. It can be used for one project over four months, two projects over two months, or four projects over one month.

**A controlling calendar with reporting employees:** If you and your team regularly work together on the same items, you might consider having each item subdivided into rows for each team member. Plan the work and benchmarks each person is accountable for, together or individually. You can keep the master calendar yourself or copy it and give it to everyone on the team.

ITEM NAME	JUNE					JUNE					JUNE				
	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19
Tom															
Sarah															
David															

Use these ideas alone or in combinations. You may even find

that you'll use more than one version of controlling calendar. Not everyone in your company has to use the same version.

## The Bottom Line about the Controlling Calendar

The controlling calendar is your tool for *planning and tracking your work and results and the results that others owe you*. Not only is it a simple, at-a-glance view of all your accountabilities, it's also a record of all your efforts to find the most effective ways of achieving your goals.

The controlling calendar's three dimensional quality – past, present, and future – adds a perspective you won't get in the most sophisticated calendar systems. It reports results immediately so that people and projects stay on track with a minimum of correction. That kind of feedback keeps the flow of work smooth and anticipates the bumps along the way.

And finally, the controlling calendar will help you with one of your primary accountabilities as a manager – achieving results through other people – in a way that keeps relationships respectful and helps reduce a lot of the negative emotions and misinterpretation that can get in the way. The controlling calendar clarifies everyone's accountabilities, records results, and assures your people that evaluations of their performance are not arbitrary but based on a written record of results achieved.

While you and your people may have many different reactions to using the controlling calendar, at least at first, it will be well worth the initial effort. As the new habit begins to take hold and everyone sees how much more disciplined and productive you've become, and how little effort it takes to get great results using your calendars, you'll be glad you've made the controlling calendar system one of the many effective business development tools you're using to build a business that really works.

