CALENDARING:
THE SOFT SKILLS

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INTRODUCTION

- About me
- Scope of this presentation
  - The soft skills of calendaring
- Why soft skills matter more now than ever in the age of artificial intelligence

AGENDA

Introduction

Technology

Calendaring Best Practices

Prioritization Methods

Summary

Group Discussion Challenges

TECHNOLOGY

CALENDARING TOOLS

CALENDAR PLATFORMS
- Office 365
- New Outlook for Windows
- Google Calendar
- Apple Calendar

VIRTUAL MEETINGS
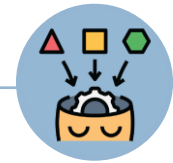- Microsoft Teams
- Zoom
- WebEx
- GoToMeeting

SCHEDULING HELPERS
- Doodle
- Xoyondo
- Calendly

ARTIFICIAL INTELLIGENCE
- Clickup
- Motion
- Reclaim
- Clockwise

HUMAN KNOWLEDGE
- Technology
- Relationships
- Strategic planning

CALENDARING BEST PRACTICES

BE A STRATEGIC PARTNER

Know your leader's goals and priorities, then proactively design their calendar to facilitate those goals

- Fundraising
- Administration
- Town and Gown Relationships

Know your leader's preferences!

- When are they most productive?
- How well/quickly do they move between topics?
- Understand your leader's expectations for gatekeeping and access
- When are they *never* available

Anticipate and provide preparatory materials for meetings, answering questions before they have them

- Agendas
- Research
- Policy positions

STRATEGIC CALENDARING

- Have a clear purpose: no agenda, no meeting
- Become a **proactive calendar manager**
  - Don't just fill an open hole on the calendar. Find where the meeting makes the most sense in terms of similar topics or advantageous sequencing, even if that requires moving some things
- Move away from transactional thinking

STRATEGIC CALENDARING

Time-Blocking

- Proactively create calendar blocks for:
  - Prep and follow-up
  - Email
  - Strategic planning
  - Meals/Breaks
  - Personal Time

Calendar Stacking

- Stack calendar items with similar topics to avoid the task-switch cost
- Stack calendar items with similar locations

Prioritization

- Strategic priorities
- Immediate deadlines
- Urgent global events and communications

PRIORITIZATION METHODS

EISENHOWER MATRIX

- **Do**
  - Crises/Emergency meetings
  - Pressing problems
  - Unforeseen events
- **Schedule**
  - Proactive work
  - Strategic planning
  - Creative endeavors
  - Relationship building
- **Delegate**
  - Unnecessary meetings/reports/tasks
- **Eliminate**
  - Meetings without agendas
  - Time-wasting activities

URGENT　　　NOT URGENT

IMPORTANT

Do

Tasks with deadlines or consequences

Schedule

Tasks with unclear deadlines that contribute to long-term success

NOT IMPORTANT

Delegate

Tasks that must get done but don't require your specific skill set

Eliminate

Distractions and unnecessary tasks

RAPID PLANNING METHOD (RPM)
RESULTS-ORIENTED/PURPOSE-DRIVEN/MASSIVE ACTION PLAN

"The key is not to prioritize what's on your schedule, but to schedule your priorities." Stephen Covey

R

WHAT DO I REALLY WANT?

- "Setting goals is the first step in making the invisible into the visible." Tony Robbins
- SMART Goals
  - Simple
  - Meaningful
  - Actionable
  - Realistic/relevant
  - Trackable

P

WHAT'S MY PURPOSE?

- Why? Draw a connection between "must do" and the leader's purpose.
- What motivates the leader to be successful?

M

WHAT DO I NEED TO DO?

- "Where focus goes, energy flows" Tony Robbins
- Strategic planning
- Define desired outcomes and create a plan
- Prioritize actions with the greatest impact
- Time blocks for each action

EAT THAT FROG

" If it's your job to eat a frog, it's best to do it first thing in the morning. And if it's your job to eat two frogs, it's best to eat the biggest one first."

Mark Twain

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SUMMARY

- Calendaring is one of the most important roles for an EA/PA and where we have the greatest ability to build trust and rapport with our leader

- Technology is necessary and will continue to evolve. However, technology will not soon replace institutional knowledge, aid real-time decision-making, or facilitate relationships. Our superpowers rely on being strategic partners to our leader.

- Being a strategic partner means:
    - thinking of the calendar as a system to support the goals (priorities) and aspirations of your leader and the organization
    - accounting for the physical, intellectual, social, and emotional needs of your leader
    - reading between the lines
    - Assessing priorities and proactively managing the calendar and your leader's time
    - Utilizing tact, diplomacy, sound judgment, and discretion
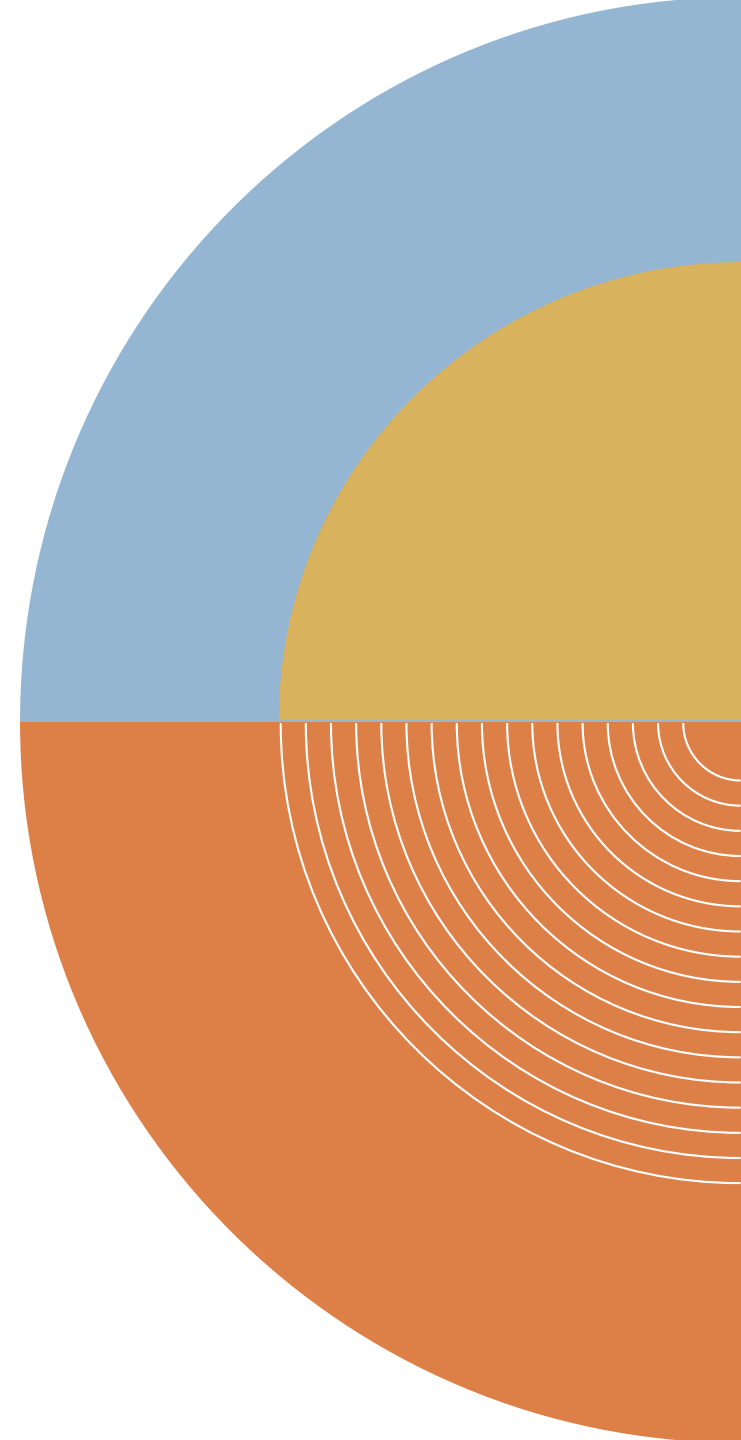
CHALLENGES

GROUP DISCUSSION

1. How do you manage privacy and access to your leader, including shared calendars?
2. How do you balance administrative, academic, and personal commitments?
3. How do you title sensitive meetings on shared calendars?
4. How do you get your leader to eat their vegetables (attend meetings or events they don't want to attend but optically, they need to attend?)
5. Does your leader use multiple calendars, i.e., personal, work, research, etc., and how do you manage that?
6. How do you learn your leader's priorities when they are new to the role and have not fully established them yet?

THANK YOU

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RESOURCES

- **System Thinking 101**: A Primer for Generalists, https://hackernoon.com/system-thinking-101-a-primer-for-generalists
- **The Systems Thinker:** https://thesystemsthinker.com/
- **20 Ways to Master Your Executive Calendar Management:**
- https://www.bloomsybox.com/blog/posts/20-ways-to-master-your-executive-calendar-management
- **Time Blocking:** https://todoist.com/productivity-methods/time-blocking
- **Task-Switch Cost:** https://www.loom.com/blog/cost-of-context-switching
- **Rapid Planning Method:** https://www.tonyrobbins.com/pdfs/Workbook-Time-of-your-Life.pdf
- **SMART Goals:** https://www.forbes.com/advisor/business/smart-goals/