

# JUGGLING PRIORITIES

Without Dropping the Ball



# WHICH OF THESE DO YOU RELATE TO MOST? THE PROBLEM



**TOO MUCH  
TO DO**



**DISORGANIZED**



**ALL WORK,  
NO BALANCE**



**BUSY AND  
UNPRODUCTIVE**



**ALL MEETINGS,  
NO WORK**

# TO-DO MANAGEMENT IS PART ...



# MULTITASKING MYTH OR FACT?

Switchtasking is a Thief

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1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21

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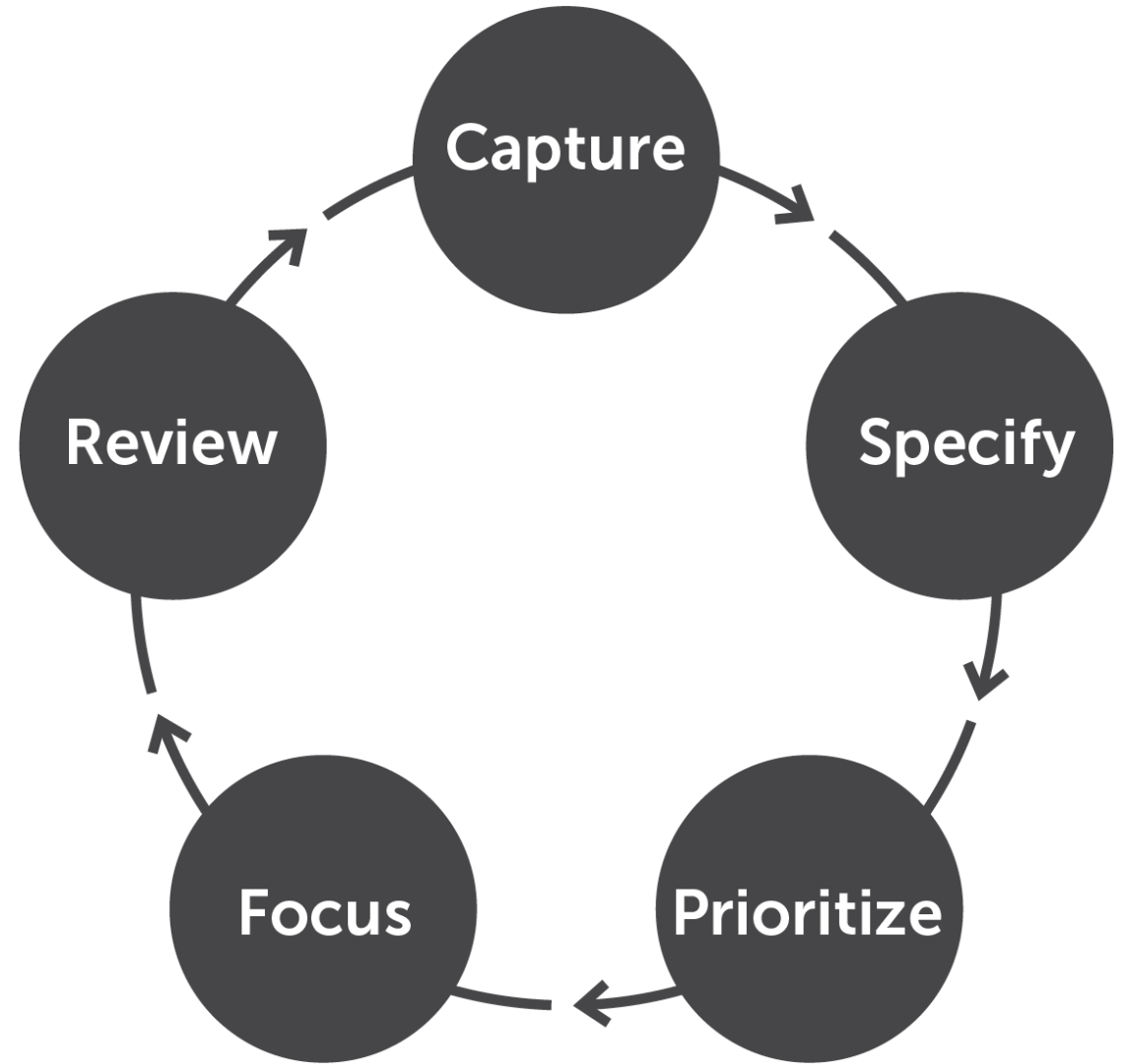
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1 2

# THE SOLUTION

An Effective System for  
Increasing Productivity

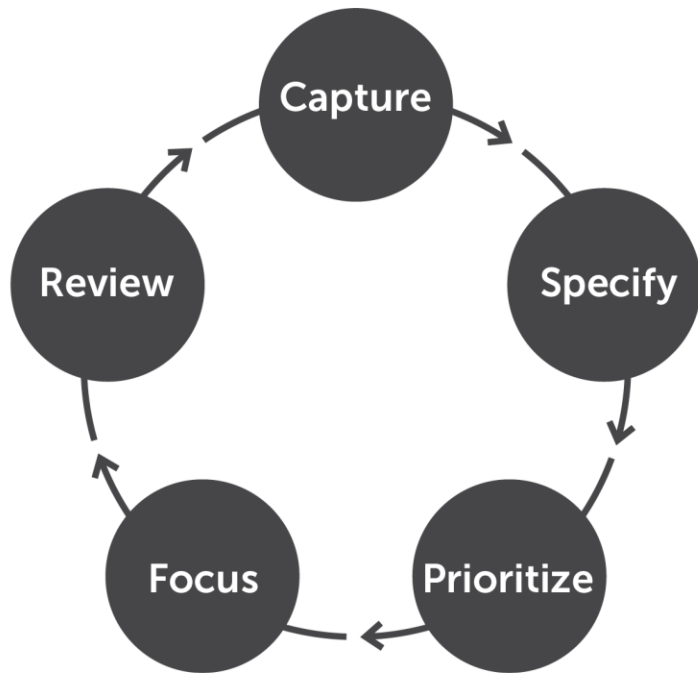






meeting text meeting  
text email text  
text  
email meeting  
favor? email favor?  
**Where do your to-dos come from?**  
text  
• Who do you get them from?  
meeting email  
• How do you get them?  
text text  
email meeting  
favor? text

# STEP 1: CAPTURE

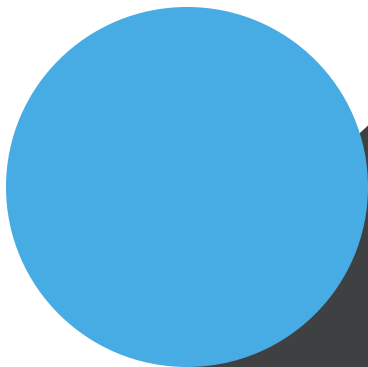


- Reduce the inputs.
- Choose your tool (1-3 chosen tools).
- Make sure the tools are easy to use, readily available, and reliable.



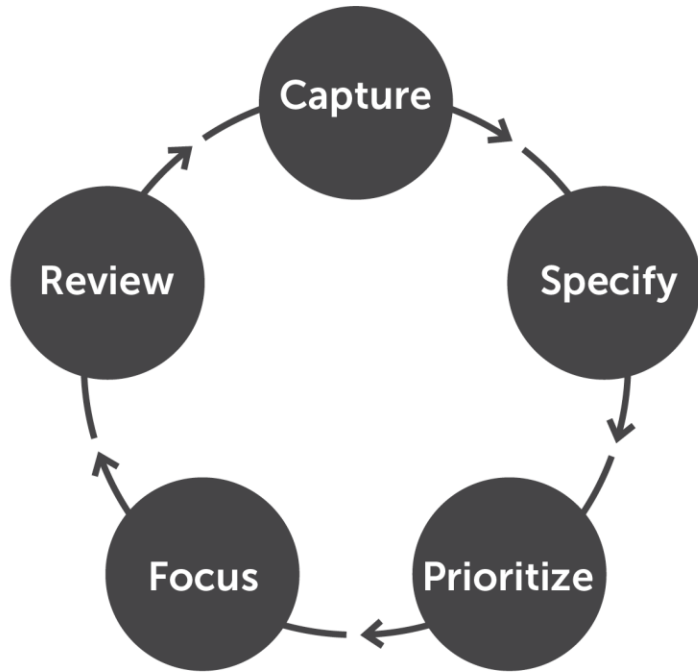
# STEP 1: CAPTURE

Fold a piece of paper in half vertically.  
On the left side, brain dump your to-do's.





# STEP 2: SPECIFY



- Identify if there is a next action to be taken. If not, is it trash or something to file?
- Specify what exactly is the next physical observable activity required to move the situation along.

# ARE YOUR TASKS ACTIONABLE?

Team Meeting  
Next Week



**Reserve conference room  
for Monday at 2 PM**

Casey Update



**Complete a note about the IP  
update in Casey's file**

Policy Revision



**Email Jan to share edits to the  
new reporting policy**

Tour Brennan



**Schedule date to take Brennan  
on tour of the new residence**



# STEP 2: SPECIFY

From your brain dump, choose 4-5 tasks (use action verbs) and write each one on a sticky note.

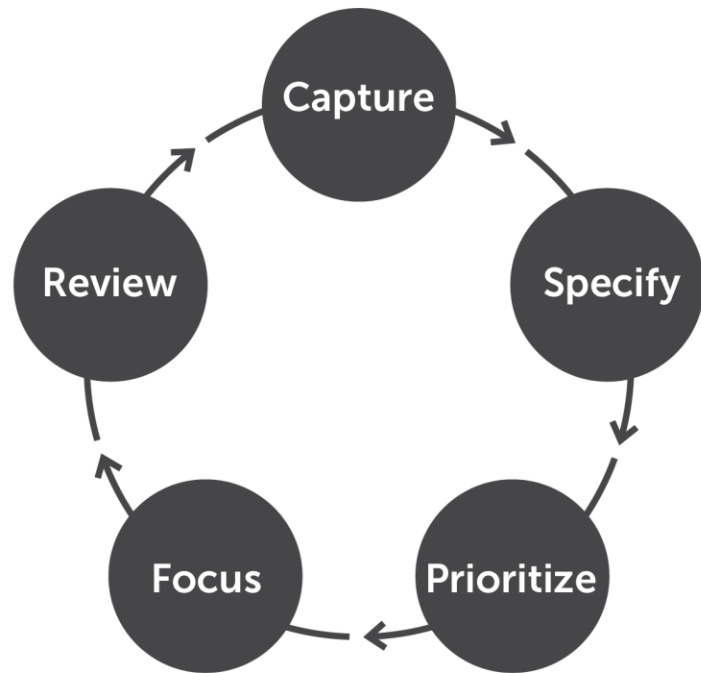
**What is the next physical, visible activity required to move the situation toward completion?**



## Next Action Verbs:

Draft, Call, Email, Read,  
Review, Talk to, Fill out, Pick  
up, Drop off

# STEP 3: PRIORITIZE



Sort tasks into categories:

- **Do Now** – If an item takes under 2 minutes, do it right away
- **Do Soon** – Put it on your calendar to do as soon as appropriate
- **Delegate**
- **Dream**



# STEP 3: PRIORITIZE

Fold a piece of paper into two columns.

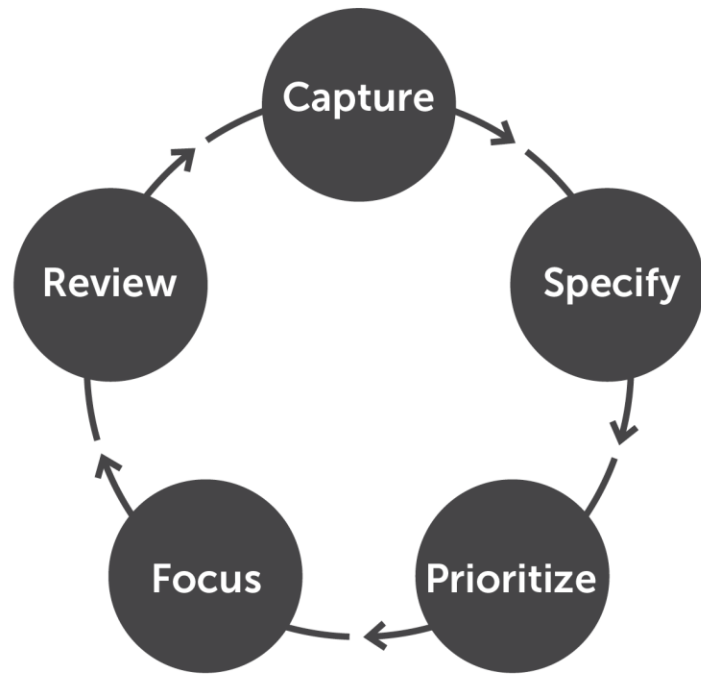
Label the two columns: Do Now & Do Soon.

For the table, label one sheet of paper "Delegate."

Sort your sticky notes into the correct places!



# STEP 4: FOCUS




- Calendar the firm and fixed.
- Time Block: Schedule time for actions (e.g., Capture & Sort or Focused Work) you want to do at a certain time regularly.



# STEP 4: FOCUS

Take Out Your Calendar,  
Review It for Firm and Fixed.  
Consider Time Blocking.



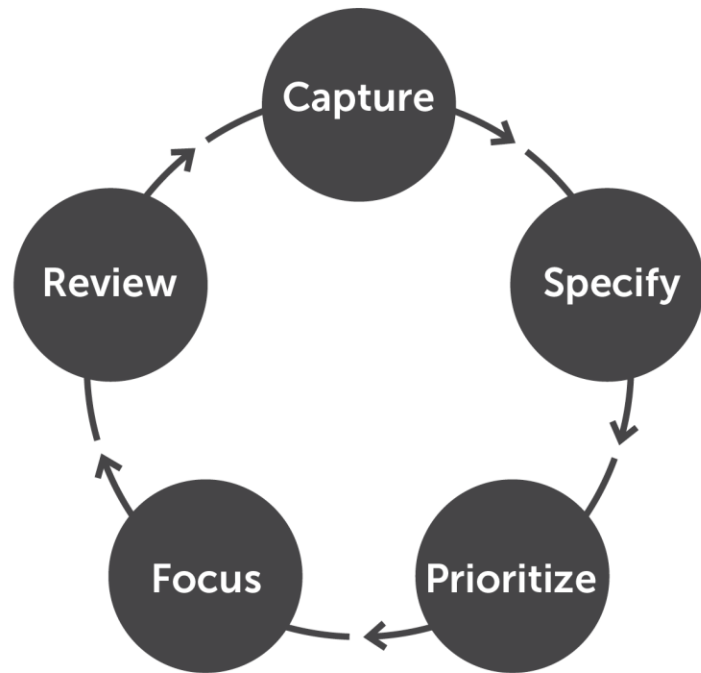


# THREE TYPES OF FOCUS

- Doing Pre-Defined Work
  - Working on calendar items and next actions
- Doing Unplanned Work
  - Handling new work as it comes
- Defining Your Work
  - Processing your inboxes to get to zero inputs



# STEP 5: REVIEW



- Reflect on the past week, current week, and next week.
- What do I need to capture and specify? Include a brain dump.
- What do I need to sort and schedule? (Review your lists and calendars.)
- What do I value and wish for? (Don't forget to dream!)
- Calendar your review!

# EXPECT THE UNEXPECTED...

A surprise text!

An urgent email with a significant task!

A phone call with an emergency!

What do you do?





# **CAPTURE. SPECIFY. PRIORITIZE. FOCUS. REVIEW.**

Rinse and repeat.



Allen, D. (2015). *Getting Things Done: The Art of Stress-Free Productivity* (Rev. ed.). Penguin Books.

# WHAT IS ONE KEY TAKEAWAY?

What is one key takeaway that you will use to help you to start juggling your priorities?



# Headshot Station



**RESERVE  
YOUR SPOT**

**No spots left? Stop by!**  
We'll fit you in for a walk-up.

# SAY IT RIGHT, WRITE IT TIGHT

The Art of Effective Emails



April 23, 2025

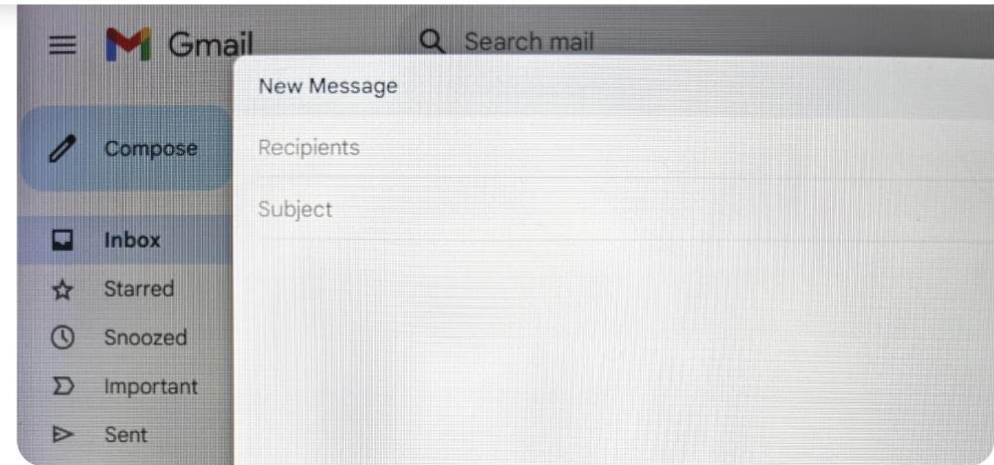




# REVIEW EMAIL TIP SHEET

## Say It Right, Write It Tight

### The Art of Effective Emails



### Should this be an email or not?

If it's urgent, it is **not** an email. Urgent matters require a quick, dynamic response.

**Emails are for** reminders, calendar invites, sharing information, updates, or documentation.

#### Subject Line

- Make the subject line a summary of the email (i.e., "Housing Update")
- Limit to 40 characters so it can be easily read on a phone.
- When needed, use **action-oriented** phrasing and cues for next steps: "[Action]: Review Updated Housing Plan by Friday"

#### Body of Email

- **Brevity is Beautiful.** Make it short and sweet.
- **Avoid jargon and acronyms** when communicating with recipients or family/caregivers.
- **Start with what's most important.** If there's an ASK or TASK, put it first.

#### Don't make them hunt for it.

- Use sub-headings and formatting (like highlighting, bold text, color) to move their eyes to critical information.
- Use bullet points, or numbering for structure. This makes it easy to reference later.

#### Read and Review

- **Before you hit send, read it out loud!**
- Are there typos? Is it too wordy? Did you include the attachments?
- Confirm you are sending it to only those who need it.
- Avoid using "reply all" unless necessary.
- If something takes more than a paragraph to explain, follow up with a phone call.



**Subject:** quick question

Hey,

I was just thinking maybe you could take a look at the thing emailed last week about the housing change for Missy Reed. It's been a few days and I haven't heard back, and I'm starting to get worried. She's got gall bladder sugery coming up. I'm not really sure what's going on, but we probably need to figure it out ASAP or something bad could happen.

Also, I went ahead and cc'd everyone I could think of just to keep them in the loop—hope that's okay. I didn't attach the form again, but let me know if you want me to.

Anyway, would be great to hear back at some point when you can.

Thanks,

J

# POPCORN REPORT OUT





**Subject:** quick question

Hey,

I was just thinking maybe you could take a look at the thing emailed last week about the housing change for Missy Reed. It's been a few days and I haven't heard back, and I'm starting to get worried. She's got gall bladder surgery coming up. I'm not really sure what's going on, but we probably need to figure it out ASAP or something bad could happen.

Also, I went ahead and cc'd everyone I could think of just to keep them in the loop—hope that's okay. I didn't attach the form again, but let me know if you want me to.

Anyway, would be great to hear back at some point when you can.

Thanks,

J



**Subject:** Follow-Up: Housing Change Request for Missy Reed – Response Needed

**Hello Mr. Davis,**

I'm following up on the email I sent last week about the housing change request for Missy Reed. I wanted to see if you've had a chance to review the request.

This is time-sensitive, as Missy has surgery scheduled next week, and stable housing arrangements should be made prior to that.

I've copied relevant team members to keep everyone informed but let me know if I should include someone else.

I appreciate your attention to this and look forward to your response.

**Best regards,**

**Jordan Taylor, LMSW**

**Case Manager | Family Resource Network**

[j.taylor@frn.org](mailto:j.taylor@frn.org) | (555) 123-4567

# LET'S RECAP

## Juggling Priorities

What's the benefit of using fewer capture tools to track your To-Dos?

## Time Blocking

How can time blocking help you manage your work and calendar?

## Emails

What is the one new nugget you picked up from the Email Tip Sheet?



**TIME FOR A BREAK!**

Welcome! Select a time and click Start  
[Intro] [Reveal\*]

0 hr ▾ 30 min ▾ 0 sec ▾

**00:30:00**

☐ Play sound when timer ends

Start Timer Dark Theme ▾



# Headshot Station



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We'll fit you in for a walk-up.

# TAMING THE TURMOIL

Tips for Masterful Meetings



# LEARNING GOALS

Gain tools to systemize and support planning for and facilitating meetings.

Practice four steps for de-escalation and offer authentic emotional validation.



# Tips for Masterful Meetings



## **Decide**

To meet or not to meet?  
That should be the question!  
(See reference.)



## **Organize**

Complete Meeting Capture and  
review materials.



## **Prepare**

Complete Meeting Planner  
(1 week to 1 month before  
meeting.)



## **Attend**

Engage fully in your meetings. See them  
as opportunities for shared achievement.  
If you are leading the meeting, use  
strategies to guide your team to their  
core objective and measure of success!

# DECIDE: TO MEET OR NOT TO MEET?

## To Meet

- Complex or sensitive issues that require:
  - Discussion/clarification
  - Brainstorming
  - Problem-solving
  - Decision making
- Building relationships
- Fostering collaboration
- Review or feed forward

## Not To Meet

- Simple or non-urgent matters
- One-way communication
- Quick response
- Quick decision





# To Meet or Not to Meet?

How to choose a mode of communication that best meets your needs:

**Start here:** Consider the urgency, complexity, and purpose of the communication, as well as how many people are involved and the relationship with the recipient(s).

**Meetings** are important for complex or sensitive issues that require in-depth discussion, brainstorming, problem-solving, or decision-making; building relationships or fostering collaboration (like mentorship or supervision), giving or receiving feedback (feed forward!), and taking a retrospective look at something. Meetings help ensure everyone is on the same page. **ASK: Is there a risk of not meeting?**

**Text/Slack/Teams messages** work for prompting immediate, well-understood actions between two or more people. Use for urgency, informality, simple updates, clarifications, or quick questions.

**Phone calls** work for prompting immediate, poorly understood actions. Use for discussion, clarification, building rapport, sensitive issues, or items requiring personal interaction. Usually these are for one-on-one communication.

**Emails** work for reminders, calendar invites, updates, and one-way information sharing (including documents and pre-meeting info), especially when a record is necessary. Remember: Email is not urgent. Response times may be 24–48 hours later.

**Postcards** work for quick, simple information or timely reminders.

**Letters** can work as reinforcement alongside other channels, but consider writing on the outside of the envelope to help the letter get noticed.

# **ACTIVITY: TO MEET OR NOT TO MEET**

**Step 1:** Sort into two piles: “To Meet” or “Not to Meet”

**Step 2:** Sort “Not to Meet” pile into new piles by next steps



**“Every minute you spend in planning saves  
10 minutes in execution; this gives you 1,000  
percent return on energy”**

**-Brian Tracy**



# MEETING PLANNER

Meeting Type:

Meeting Lead:

Meeting Date:

Time: (Start/end)

Location:

Meeting Purpose: (Circle one or two)

Plan | Align/Decide | Brainstorm | Connect | Look Back/Feed Forward

- ✓ **Organize and Clarify Meeting Needs**
- ✓ **Think Differently!**



# MEETING PLANNER

What are some of the kinds  
of meetings you attend?

# MEETING PLANNER

**Meeting Type:**

**Meeting Lead:**

**Meeting Date:**

**Time:** (Start/end)

**Location:**

# MEETING PLANNER

**Meeting Type:**

**Meeting Lead:**

**Meeting Date:**

**Time:** (Start/end)

**Location:**

**Meeting Purpose:** (Circle one or two)

Plan | Align/Decide | Brainstorm | Connect | Look Back/Feed Forward

# MONICA

Monica is a 24-year-old recipient who has participated in a center-based vocational program for over a year. She was previously very engaged and upbeat—helping others, taking initiative, and looking forward to her daily routine. Over the past month, Monica has become withdrawn, no longer engages in vocational tasks, and has been observed sleeping for most of the day. She's also skipping meals and has shown a decline in personal hygiene.

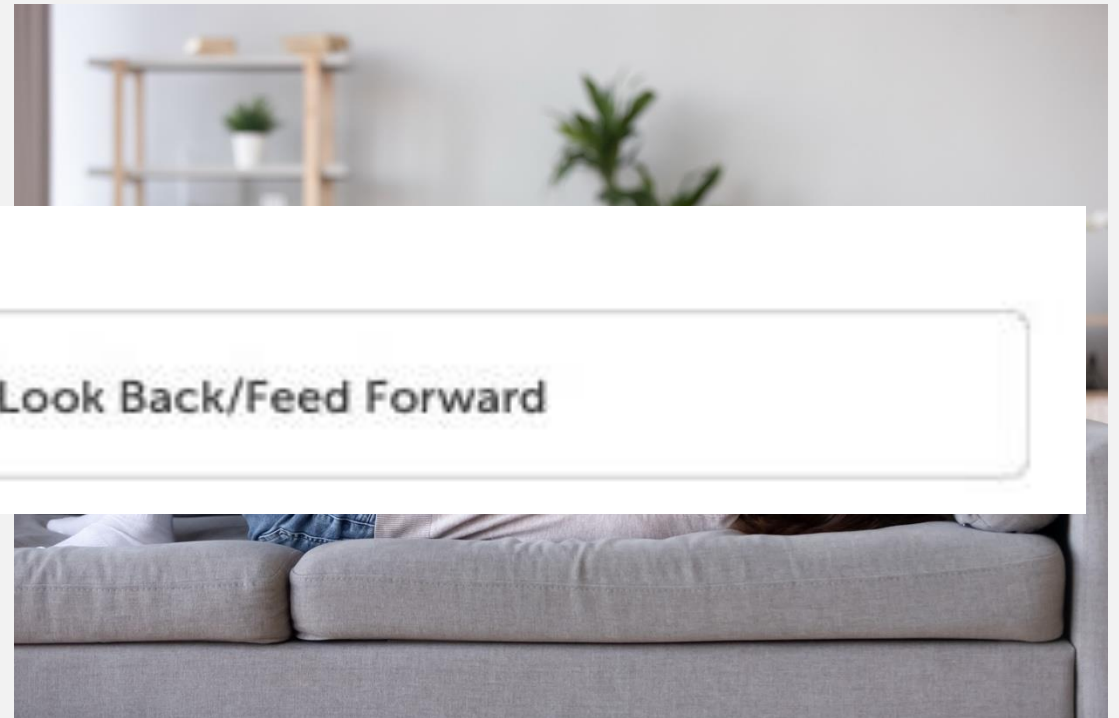
# MONICA

The Case Manager contacted Monica's mother, who confirmed similar changes at

**Meeting Purpose:** (Circle one or two)

Plan | Align/Decide | **Brainstorm** | Connect | Look Back/Feed Forward

medical changes or behavioral incidents have been reported, but staff are concerned.



# MEETING PLANNER

**Meeting Goals:** Why meet? Keep them clear and brief!



# PLAN: MEETING SUCCESS



# PLAN: MEETING SUCCESS



**This meeting will be a success when we ...**

- **Remain curious about Monica**
- **Brainstorm at least 4 potential causes for her change in behavior**
- **List 3 next actions to support Monica's well-being**



# PLAN: WHO and WHAT

## Participants

- Who is needed to achieve the goals and reach success *for this meeting*?
- What perspectives are necessary?
- Who is NOT needed? (Avoid unnecessary meeting invitations!)

## Agenda

- Start with connection.
- Each item has a point person and timeframe.
- More than an hour? Schedule a break.
- Clarify roles for attendees.

# MEETING PLANNER

## Agenda Items | Point People | Time Allotted:

Opening Connection Question	Case Manager	5 minutes
(Agenda Item)	(Point Person)	(Time Allotted)
Review of Concerns and Observations	Vocational Provider & Job Coach	10 minutes
Input from Clinical Supports	Behavioral Health Specialist / DDS Nurse	10 minutes
Guardian Perspective & Discussion	Case Manager facilitates	10 minutes
Action Planning & Next Steps	Whole Team / CM or Notetaker Documents	10 minutes

# MEETING PLANNER

## **Before Meeting:**

- ☐ Reserve location or platform (e.g., Zoom)
- ☐ Send calendar invites to participants, including:
  - ☐ Completed meeting planner
  - ☐ Request agenda additions (ensure alignment with type/goal)
  - ☐ Personal asks for timekeeper and notetaker (if possible)
- ☐ Formulate pre-meeting questions (elicit feedback)

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- ☐ List items needed before meeting and from whom (e.g., assessments)

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- ☐ List background info for meeting and documents to share ahead of time (attach to invite)

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# ORGANIZE: 1 TO 2 DAYS AHEAD



## Organize

Complete Meeting Capture and review materials.

- Review Meeting Planner
- Check meeting invite responses – send reminder
- Pre-meeting questions
- Waiting for \_\_\_\_\_ from \_\_\_\_\_?
- Provide background information

# SHOWTIME!

**MEETING CAPTURE**

**Core SMART Goals** \_\_\_\_\_

**Meeting Mindset:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Meeting Type:** \_\_\_\_\_

**Meeting Lead:** \_\_\_\_\_

**Timekeeper:** \_\_\_\_\_

**Notetaker:** \_\_\_\_\_

**This meeting was successful because ...** \_\_\_\_\_

**Agenda: Time | Topic | Speaker | Decision | Next Action**

**Start Time** \_\_\_\_\_

<input type="checkbox"/>	(Time Start)	(Topic)	(Speaker)	(Decision)	(Next Action, By Whom, by Date)
<input type="checkbox"/>	(Time Start)	(Topic)	(Speaker)	(Decision)	(Next Action, By Whom, by Date)
<input type="checkbox"/>	(Time Start)	(Topic)	(Speaker)	(Decision)	(Next Action, By Whom, by Date)
<input type="checkbox"/>	(Time Start)	(Topic)	(Speaker)	(Decision)	(Next Action, By Whom, by Date)
<input type="checkbox"/>	(Time Start)	(Topic)	(Speaker)	(Decision)	(Next Action, By Whom, by Date)

**End Time** \_\_\_\_\_

**Notes/Follow Up:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## The Meeting Capture

- Share with notetaker or timekeeper to take notes
- To be used during the meeting

# MEETING CAPTURE: MONICA

- **Step 1:** Pick up a role card
- **Step 2:** Discuss possible causes for Monica's behavior changes
- **Step 3:** Use Meeting Capture to capture ideas



# TIPS TO FOSTER COLLABORATION



## Tips to Foster Collaboration: Making Space for All Voices in Meetings

**Assign Roles to Participants** – Leverage the talents of everyone and enhance engagement by assigning timekeeper or notetaker roles (or other roles). It can be helpful to do this when you send the calendar invitation, but if you didn't, it's okay to ask at the meeting start.

**Start Meetings with Questions** – Ask a question to get people to share something playful, unique, or interesting. This creates connection before you dive into the content of the meeting. Consider additional questions to center and align the focus on the Meeting Mindset and Goals. Be sure to collect responses from a variety of people, not just the vocal ones.

**Use Pre-Meeting Questions** to get Asynchronous Feedback! Here's space to synthesize.

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**Note Card/Whiteboard Feedback** – Gives everyone a voice without having to speak up in a group. Pass out blank cards or use web tools like Whiteboard or Mural, then ask a question and give everyone time to write. Collect written responses and share feedback anonymously with the group.

**Round-Robin Responses** – Gives everyone a turn. Let everyone speak on a topic for one minute by going around the table. It may feel odd at first, but if you use it often, people learn to expect it and appreciate the invitation to speak. Anyone may pass if they have nothing new to add to the discussion.

**Breakout Groups** – Form small groups to discuss a topic. This helps encourage introverted participants to contribute since they won't face the pressure of everyone's attention at once. Ask a volunteer to report out for the group as needed.

**You Have the Floor** – Keeps one person speaking at a time. Use a tool such as a stapler, or an icon online, to indicate who the speaker is. Only the speaker speaks, everyone else is a listener. Pass the floor as needed.

**Give Time for Thought** – Everyone processes differently. It can be generative to take a 60-second pause so participants can think before discussion.

**Make Space for Healthy Debate** – Sharing different perspectives is important – it helps refine your ideas. When there are different opinions, focus on the interest behind the idea not the position itself. Speaking about the goal or intention helps the group find creative solutions and common ground at the same time.

**OUCH:** When things get heated ... turn tension into trust with the De-Escalation Dial!

# WHAT DO YOU WANT TO START DOING?

- What is one thing you can implement into your meetings that you learned today?



# Headshot Station



## **RESERVE YOUR SPOT**

**No spots left? Stop by!**  
We'll fit you in for a walk-up.

# DE-ESCALATION DIAL

Turning Tension Into Trust



**Can you recall a time when you were around  
someone who got pretty heated?**





# DE-ESCALATION DIAL





- “You” statements
- It takes practice



# MONICA

A provider reports that a previously active participant is now refusing to engage in vocational tasks and sleeping during the day. The team needs to meet to explore causes and determine supports.



# ESCALATION MOMENT

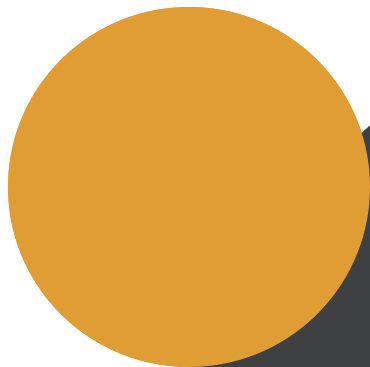
- During the meeting, the team is reviewing observations when the program supervisor says:
- “This isn’t the first time we’ve seen this behavior. Honestly, we can’t keep spending so much time trying to get her to participate. We have others who actually ***want*** to be here.”

# ESCALATION MOMENT

- Monica's mother—already emotional—immediately reacts:
- “Excuse me?! Are you saying my daughter doesn't deserve support because she's struggling? That is completely out of line! I'm not going to sit here while you blame her!”



# **PRACTICE: DE-ESCALATION DIAL**

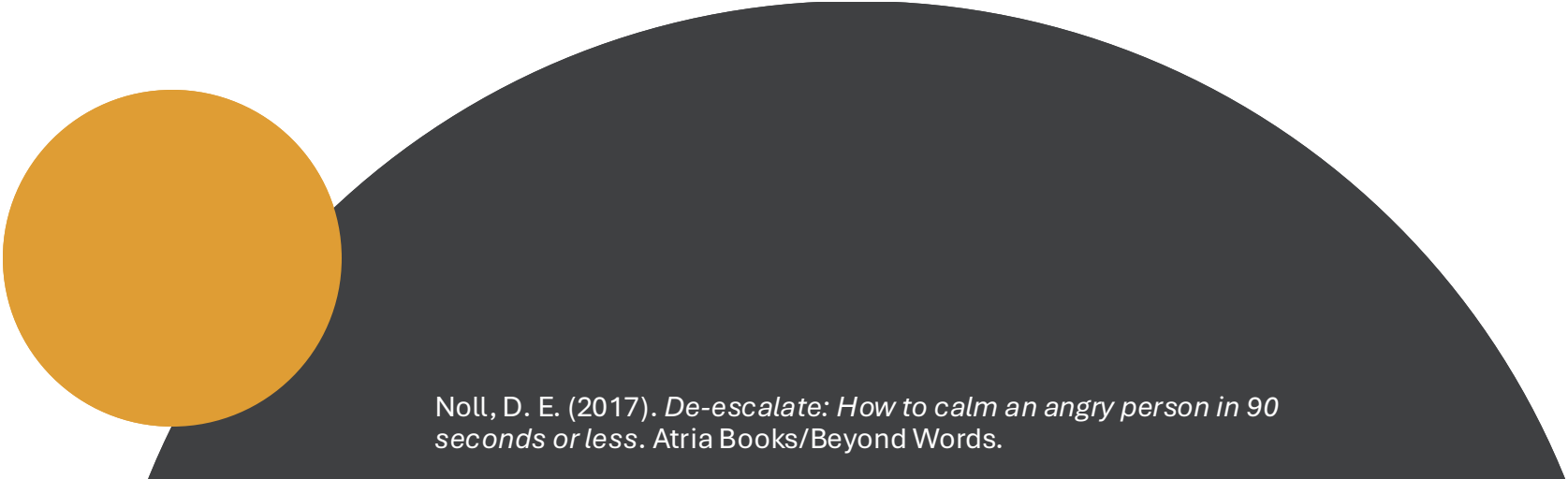


# DEBRIEF





# LET'S RECAP!



Noll, D. E. (2017). *De-escalate: How to calm an angry person in 90 seconds or less*. Atria Books/Beyond Words.

# REWARD YOUR EFFORT!

Raffle Giveaway



# Headshot Station



## **RESERVE YOUR SPOT**

**No spots left? Stop by!**  
We'll fit you in for a walk-up.