

**ON - THE - JOB TRAINING RECORD
CONTINUATION SHEET**

Date of Training: _____

Lesson Category: Pre-Call Planning

Lesson Title: Planning & Scheduling: What's the Difference?

Student Materials/Activities:

1. Students were instructed to listen to the audio "Planning & Scheduling: What's the Difference?"
2. Students were instructed to complete the Sales Success Worksheet.

Learning Objectives:

1. To identify and discuss the four ways people "think."
2. To identify and discuss the difference between planning and scheduling.
3. To discuss the concept of "inter-locking objectives" and how it relates to planning.
4. To identify and discuss three tips for improving scheduling.
5. To identify and discuss one method for prioritizing activities.
6. To identify and discuss the key to good time management.
7. To have the students participate in a guided discussion about time management skills related to planning and scheduling.

Lesson Outline:

1. Identify and discuss the four ways people "think."
 - a. Conceptually: Always high in the sky – looking at the mega-picture.
 - b. Strategically: Closer to the ground, eyeing the major direction they're headed in.
 - c. Tactically: Getting from Point A to Point B.
 - d. Operationally: Dotting the "I's" and crossing the "T's."
2. Identify and discuss the difference between planning and scheduling.
 - a. A plan tells you what to do.
 - b. A schedule tells you when to implement the plan.
3. Discuss the concept of "inter-locking objectives" and how it relates to planning.
 - a. What must happen?
 - b. How long will it take for each of these things to happen?
 - c. How do I prioritize these activities?
 - d. How do I allocate time for these activities?
4. Identify and discuss three tips for improving scheduling.
 - a. When traveling, ask yourself "What time do I have to leave to get there?" And add 20%.
 - b. Schedule activities on the quarter hour instead of the hour to allow time for delays and detours.
 - c. Add 20% to 40% more time to any block of time you schedule for an activity to account for interruptions, technical problems or having to wait for latecomers.
5. Identify and discuss one method for prioritizing activities.
 - a. Label every activity on your plate as A, B, or C.
 - b. Start with the A's and decide which need to be AAA's, AA's or A's.
 - c. Begin with the AAA's, then the AA's, then the A's, then the B's, then the C's.
 - d. Review your activities to determine if some must be moved up on the priority rating list.
 - e. Don't be surprised if you never get to the C's – they may not be that important anyway.
6. To identify and discuss the key to good time management.
 - a. Self-discipline
 - b. You can't manage your time effectively on an activity if you don't want to accomplish the activity in the first place.
7. Using the Sales Success Worksheet and the questions on page 2 of the Manager's Meeting Guide, the leader will conduct a guided discussion about time management skills related to planning and scheduling,

LAST NAME - FIRST NAME - MIDDLE INITIAL