11.1 Planning your workload

In any career, or personal pursuit, planning and managing a workload is an essential skill. In public relations, you will often need to work on several varied projects, with multiple stakeholders, at the same time. Efficient planning and organisation is one of the most valuable skills that you have. This is particularly important in the PR industry because managers will be under pressure to keep costs under control and to increase staff workloads in response to the needs of internal and external clients.

In this unit, you will gain a theoretical understanding of time management principles, and a practical grounding in how to apply these skills and approach problems with managing your workload.

Planning and managing a workload well facilitates a better work/life balance, enables better relationships with colleagues and could allow you to take on more projects or set up an agency of your own.

By the end of this unit, you should be able to plan and manage your workload to achieve your maximum potential without becoming stressed or compromising the quality of your work. You should also be able to evaluate these skills to continually improve productivity.
1 Planning your workload

Workload

When working in a PR environment your workload is likely to be varied, with many different competing demands on your time, and important deadlines to meet. Your workload may consist of the following.

- Projects you are personally responsible for: you will be involved in the major decisions; you will need to identify the tasks that need to be completed, set mini-deadlines and coordinate the efforts of anyone else involved in the project. You will also need to keep clients and colleagues updated and informed of any developments.
- Supporting colleagues on projects they are personally responsible for: this may involve providing help or expertise for colleagues, and projects can range from pitches for new business to delivering a long-term PR campaign.
- Smaller administrative and non-project tasks: these tasks may not be directly tied to a specific project, but dealing with them may be a significant part of managing your workload. They include tasks such as maintaining an orderly work environment, processing invoices, replying to emails, etc.

Your workload is likely to comprise a range of tasks with different levels of responsibility and importance. The key to planning and managing your workload effectively is being able to prioritise tasks and manage your time effectively.

Why effective planning is important

The way that you plan and manage your workplace can have a wide effect on other people and aspects of your life beyond work.

Effect on your professional life

Making better use of your time can increase your capacity and productivity, which means that your agency becomes more effective. If you are able to take on more work, then this may result in more interesting and demanding projects. Effective workload management could improve your career prospects and help you achieve your maximum potential.

Effect on your colleagues

Tasks are interrelated within projects, so your colleagues may not be able to start or complete their tasks until you have completed yours. Your colleagues therefore rely on you to complete tasks on time, or to give them sufficient warning if a deadline is at risk of not being met. This will enable them to plan their own workload accordingly.

Effect on life outside of work

Work affects our lives outside work. Poor planning may mean that you have to work beyond normal office hours to complete tasks, cutting into your personal time.
If you are stressed at work, it is likely that you will feel some of that stress in your home life. If you plan and manage your workload more effectively, you will feel more in control of your work; this should help to reduce the stress.

Planning your time more effectively means that you are able to be more flexible. If your agency wins a new contract and work needs to start immediately, it means you can help more easily. Being more flexible also means that you can plan holidays and time out of the office without disrupting the projects you are working on.

**Setting priorities**

When you have a range of competing demands on your time, you may find that you try to complete more than one task at a time. However, this may result in all of the tasks being done to a lower quality than you would have achieved otherwise. Alternatively, you may feel paralysed by indecision about what to do first.

Setting priorities can help you complete your work more effectively, as you clearly establish the order in which you should complete tasks and you can channel your energies more effectively.

You can prioritise work according to a number of different measures.

**Urgency and task importance**

Important or high-priority tasks are the tasks that help us achieve our long-term goals or that have other meaningful and significant long-term consequences.

A good way to prioritise key tasks is to complete a ‘priority graph’ on a daily basis, as shown in **Figure 11.1.1**.

- ‘A’ tasks should be tackled immediately.
- ‘B’ tasks should be planned and given action dates.
- ‘C’ tasks should be done as you can do them, fitted around ‘A’ and ‘B’ tasks.
- ‘Z’ tasks should be removed from your list of tasks. It is usually a major challenge to find these, let alone remove them. You should therefore consider carefully whether or not they are actually ‘C’ tasks.

**Seniority of task giver**

In a project-based work environment, you may find yourself working for a number of different people rather than just your line manager. This is because projects need a project owner to manage the team and ensure that tasks are allocated and completed on time and to the required quality standards.

This way of working can be very beneficial for your career, as it means you can gain from the experiences of a wide range of colleagues. It also means that your colleagues will be aware of your work, and if you develop a good reputation you may find that you are offered more responsibilities and opportunities. Managing your workload effectively can help you to work towards your own goals and ambitions.

When considering your career, remember that the seniority of the task giver has an impact on your prioritisation. However, regardless of how senior the task giver is, you should take time to consider whether the task is genuinely urgent before putting it at the top of your to-do list.
Consequences of failure

- When considering whether a task is urgent or important (see Figure 11.1.1 on page 3), you should also think about the consequences of the task not being completed, or of it being completed inadequately.
- Poorly executed PR tasks – particularly those for an external audience, or for an external client – can have significant impacts. They may undermine the overall message of a campaign or damage a valuable relationship with a key customer.

Working with others

Attending meetings

You will find that as you become involved with more projects, you will be invited to more meetings. Sometimes meetings are highly beneficial and help to coordinate clear and relevant actions that you can apply. However, you may find that some meetings are not the most productive use of your time.

Always check the agenda for a meeting beforehand and consider how the points to be discussed relate to you. For example, for each point on the agenda, are you:

- responsible? In this case the tasks you complete are directly related to the discussion point and your input is likely to be essential. Stakeholders may be attending the meeting and will want to know about progress.
- accountable? Are you a task owner for any of the points covered on the agenda? If so, your attendance is again probably essential as you will need either to lead the discussion or to provide guidance on any queries that arise. You will need to make sure that any deadlines are being worked towards.
- consulted? Is your input essential for this item on the agenda to be addressed effectively?
- informed? In this case you do not need to contribute, and the agenda item probably does not affect you directly. It should be enough to read the meeting’s minutes for this agenda point.

You should also think about the number of people attending the meeting. Is anyone else on the invite list able to delegate for you and attend on your behalf?

Holding meetings

Meetings are useful for getting input from others as a project requires. This may involve discussing available options, agreeing deadlines, assigning tasks or monitoring progress. If you want to know if a meeting is required or not, then ask yourself the following questions.

1. Does this meeting have a clear purpose? Do I know why we are all here?
2. Is this meeting helping to coordinate us? Are the right people here to ensure the purpose can be achieved?
3. Do actions arising from this meeting actually happen? Is anyone following up on these, and does everyone know what they are meant to be doing?
It is important to ensure that meetings are as focused and appropriate as possible, as these lead to:

- efficiency
- better decision making and problem solving
- creating new ideas
- reviewing work and setting goals
- offering support and increasing team working.

**Checklist**

These tips will help you to plan your meetings more effectively.

- Establish exactly who needs to be there – and for which items.
- Check everyone’s time constraints in advance of the meeting and then again at the start.
- Have a realistic agenda, bearing in mind the attendees and the time.
- Allocate time slots for agenda items with agreement with the meeting chairperson.
- Appoint yourself as a ‘timekeeper’ and summariser.
- Keep to the agenda.
- Ensure that everyone agrees their action points and ‘do by’ dates at the end of the meeting.

Sometimes you will be required to set up meetings for the team and on other occasions you will be the point of contact and organiser for a meeting with visitors. Remember that you will need to get agreement for some of the items on the list above from your account manager/account director.

**Busy and quiet periods**

There are natural ebbs and flows of work, and you will find that there are times when you are extremely busy with multiple deadlines and times when you are much less busy. A quiet period does not mean that you have no active projects, but it often means that the deadlines are far away enough not to feel urgent.

To plan your workload effectively through the busy and quiet periods, you need to identify each task you need to complete, make a realistic estimate of how much time each will take and take a long-term view of the deadlines involved (i.e. not just the most urgent). Use the following structure to make this plan.

**1. Make a master list**

- List all of your outstanding tasks.
- Rate them in terms of urgency and importance (using the priority graph from Figure 11.1.1 on page 3).
- List them in order of priority.
2. Plan your daily list
- Each morning, give yourself five minutes to plan your daily list.
- List the key tasks first.
- Estimate how long they will take.
- Decide how many you will achieve today.
- Decide roughly when you will do them.
- Be realistic; don’t completely fill your day. Allow for last-minute tasks.

3. Plan your weekly list
- Think about the things you cannot fit in today. When can you do them?
- Do not leave them at the bottom of the list, or you may never do them.
- Prioritise them and plan them in over the next few days.
- Anticipate busy or quiet periods and adjust your plans accordingly.
- Be prepared to reschedule as you go along.

4. Use a diary
- You need a time frame to work in – a week-to-view diary is ideal.
- Alternatively, you can make your own five-day planner.
- Another option is to use an electronic planner which allows you to enter meetings, etc. in the diary but also gives you a daily ‘to do’ list.

5. Create a routine
- Identify a ‘quiet’ time in your day or week, and discipline yourself to use this to do tasks that are low priority, but important.
- If you put aside just 15 minutes each day, you will be amazed how much you can achieve in a week.

Planning methods

There are many different methods of planning your workload. The choice of method should come down to whether it suits the way you work and your role. You may decide that a particular method works well in some circumstances (for example, a more formal project management approach for project work) and less well in others (for example, when planning your week, you might find it more useful to block out time for tasks in a diary).

Different types of planning tools

You can separate planning tools into formal or informal, depending on their characteristics. These have a number of different benefits in different situations.

- **Formal** planning tools include those such as Gantt charts, which illustrate the timescale and sequence of each task within a project. These are generally used in complex projects that involve a number of people; they are compiled and updated collaboratively. This method helps you to monitor progress against the plan. Formal planning tools are often electronic, produced in Microsoft® Project® or the equivalent, to aid easy updating and enable remote sharing if necessary. You will find out more about formal planning techniques in the next section.
Informal planning tools can be anything from a to-do list to a personal diary. This tool is generally something that only you need to see, so it may be something you record on paper or digitally. Informal planning is not used for reporting purposes, but you may include on an informal plan tasks allocated to you from a formal plan.

Workload planning techniques

Weekly activity schedule

When working in PR, appropriate scheduling will assist you to be much more efficient. You can show precise timings if you wish. It is not necessary to know exactly what will fill each time-slot, especially if you are subject to unpredictable demands. The important thing is to schedule the time to deal with what arises, and to complete activities that you can predict need to be done at certain times. You will know what sort of time you need for these activities, so plan time-slots to accommodate them.

Plan time-slots to check emails and post, but not to deal with each one fully there and then. Desperate emergencies are rarely communicated by email or post – mostly they would be communicated by telephone – so think about the sender’s realistic expectations. For most emails you will need simply to acknowledge and indicate when you will respond in full, which can be scheduled later, at a more manageable time for you, depending on the email’s importance and urgency. Plan time-slots for returning and making telephone calls – do not just do them when you feel like it or when you remember.

Plan and schedule things sensibly and logically. Think about how best to use lunchtimes, and ensure you do not work through every one – taking a proper lunch break can improve your overall productivity. Once you have produced your first weekly activity schedule, it should be easy to keep it going, as many of the slots will repeat. You will also notice monthly patterns. People in more senior roles will be planning much further ahead than you and ideally they will keep you informed about their plans where relevant. If they do not, it is good practice to ask them.

Try to plan and defend time-slots for everything that you do. Make lists and work to them. You will find you are probably at your most efficient the day before you take annual leave. However, it is possible to be this well organised every day. You must also plan time-slots for unplanned activities – you may not know exactly what you will need to do, but if you set aside the time to do it, then important things will not get pushed out of the way when the demand arises.

Ask yourself this question about a job: is it urgent or important? A job may be extremely important, but may not need doing now. Complete the genuinely urgent jobs first.

Diary planning

The more you can plan your work, the more likely you will be to meet your objectives. One important tool you can use to plan more efficiently is your diary.
The key to success in planning your diary is to **plan your year first and your day last**. The steps are as follows.

1. Enter key year planning dates in your diary.
2. Plan your next month.
3. Plan this week.
4. Plan each day at the outset.

**Checklist**

Use the following tips to help manage your diary more effectively.

- Always have a diary on your desk at work.
- Write everything in your diary in pencil – this can then be rubbed out if dates and times change.
- Enter all key events for the year into your diary – include public holidays, booked holidays, special company dates (e.g. year end, month end), birthdays, social meetings, reminders about personal appointments, etc.
- Enter all meetings into your diary – showing start times, estimated finishing times, travel times, locations (with phone numbers if outside the office) and who is going to be present – both from your company and externally.
- Book meetings with yourself, to provide time to work or think in peace and quiet. In the PR world we are paid ‘to think’ as well as ‘to do’ and an hour thinking, planning and reflecting scheduled into your online planner will help others to realise that you are being productive.
- Devise a series of colours that will allow you to indicate in the diary which times are for you alone, which are with others and which are free.
- Agree rules with others on when they can allocate time in your diary – for themselves or for others.

**List planning**

The next stage in the planning of your work is to complete a to-do list on a daily basis.

Complete a to-do list for tomorrow. Consider how long it is, how achievable it is and what can be done to shorten it if necessary.
Checklist

Use the following tips to help you use to-do lists more effectively.

✓ Have a to-do list – not a series of Post-it® notes.
✓ Keep your list up to date.
✓ Cross off completed items.
✓ Pencil in comments by half-finished items.
✓ Never allow anyone else to add anything to your list – you must agree to own the problem and write it down yourself.
✓ Be realistic about what you can achieve.
✓ Distinguish between ‘urgent’, ‘important’ and ‘necessary’ items (see the ‘A’, ‘B’ and ‘C’ tasks on page 3).
✓ Put all items on the list – personal and work related – it is your list.
✓ Put stars by the difficult items – this may encourage a greater sense of achievement when you have done these items.

Implementing plans

It is important to remember that you do not work in isolation and that you are responsible for your own work. Remember to keep your colleagues updated about your progress.

If you look at your work plan and identify a problem (for example, you might not have enough time to complete a task), discuss the problem with the task owner. It may be that the deadline can be moved, or something that you thought was high priority is actually a lower priority, or someone else on the team can complete the task.

In the often frantic world of PR, lower-priority tasks are sometimes at risk of being continually placed at the bottom of to-do lists, and eventually being forgotten. However, if you say that you are going to do something, it is important to follow through with completing the task – or, if the situation has changed, at least confirm that the task is no longer required. This is because trust is important within PR, in terms of both maintaining good relationships with clients and proving your independence to your colleagues.

When updating to-do lists (for example, if you write a fresh to-do list each day or week), make your first task to transfer unfinished tasks from your previous list to your new list.
Unit 11: Plan and manage your own workload

Portfolio activity 1.1–1.6, 3.1, 3.2, 3.3

Part of the assessment for this unit requires you to demonstrate that you understand workload planning and that you are able to apply this understanding to plan your work. To prepare for this part of your assessment, complete the following tasks.

Demonstrate, perhaps by producing a 'how-to' guide, that you understand how to plan your workload. The guide should:

1. explain how to prioritise your workload
2. explain how to plan pieces of work according to their importance and urgency
3. explain how to identify when meetings are necessary, for example, when you need input from others
4. clarify the purpose and value of planning your workload effectively
5. clarify the purpose and value of managing your time and commitments effectively
6. compare the different methods of time and diary management you could use to plan your workload.

Produce a formal plan that sets out all the tasks in your workload over a period of time agreed with your assessor or employer. Use the plan to:

1. prioritise work in the plan according to importance and urgency
2. plan the work to be in line with any objectives and deadlines
3. demonstrate that you can use the plan to prioritise how you spend your time, that you use the plan when speaking to others about your available time and as a guide to ensure you do not overlook tasks.

Further reading


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