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COMPREHENSIVE FIDUCIARY ADVICE



## *FLASH REPORT*

# Boost Your Efficiency and Effectiveness—at Work, at Home and in the World

Each day, we have limited amounts of time and energy to do what needs to be done while also trying to cultivate meaningful lives. Is it any wonder so many of us feel stressed?

The good news: It can be easier than you might think to increase your overall effectiveness and efficiency. For advice, we turned to Nick Sonnenberg\*, CEO of the outsourcing platform Leverage and a foremost expert in achieving efficiency. He's also the author of the upcoming book *Come Up for Air: How Your Team Can Leverage Systems and Tools to Stop Drowning in Work*.

### ADOPTING THE RIGHT EFFICIENCY MINDSET

Efficiency strategies are only as good as the attitudes you bring to them. The first step, then, is to approach efficiency efforts with the right mindset. For example:

**1. Your brain is for having ideas, not holding them.** This is the whole basis for the idea that you need systems in place that make it easy to access information so your brain can stay focused on what you do best—or simply having some fun.

**2. Focus on your strengths, not on shoring up weaknesses.** Each of us has our own particular abilities—the things we do best. But we tend to spend lots of time tackling our weaknesses. The result: We end up with “stronger weaknesses” that do little to further our success or enjoyment. This idea is why we should focus on eliminating, automating or outsourcing many areas of our life that aren't part of our highest and best abilities.

**3. Think about return on time.** To maximize efficiency and effectiveness, consider the return on time of a task and how to best handle it. This can help you start to better see when it makes sense to delegate a task and when it's better to tackle it yourself.

Example: It might take far longer to explain to someone how you'd like airline or dinner reservations to be handled in various circumstances than to just make them yourself. With other tasks, such as writing letters to clients or donors, you might save considerable time by letting someone else take the reins.

**4. Capitalize on your daily peak times.** We all have parts of our day when our productivity spikes and sustains. Understand when you are most productive, then have what you need to succeed at your fingertips and block out anything that reduces your effectiveness. If your brain is most effective from 10:00 a.m. to noon, don't book a doctor's appointment then—or allow co-workers or even kids to interrupt that time.

## ACTION STEPS

Here are just some of the many specific steps you can potentially take to make yourself more effective and efficient.

**1. Create and share agendas for your interactions.** One straightforward way to combat inefficiencies in your general planning is to create formal agendas (using an agenda tool such as Navigator or others). In advance of formal meetings—with staff, co-workers and even large numbers of family members getting together to discuss an issue—create an agenda that prioritizes key talking points, and share it with the people involved. This can help keep everyone on track and focused, boosting efficiency for all.

**2. Build a knowledge base of information.** A knowledge base is a one-stop shop that houses the collective knowledge and assets of a business, a group (such as a charitable organization or PTA you help run), or a family. A knowledge base makes it easy for the key players to access the information they need in order to accomplish tasks. The next time you need an answer, you'll know where to get it without having to go on a scavenger hunt! Bonus: It also works with requests from employees, team members, and even spouses and children. (One tool to consider is Process Street.)

**3. Outsource.** You probably know or have heard of the concept that just 20 percent of your actions generate 80 percent of your results. By trying to do everything, you can spend too much time on nonessential tasks—causing your productivity and enjoyment of life to suffer. Freeing up your time so you can focus on the 20 percent that really matters to the results you want can be smart. Outsourcing resources such as Leverage, Fiverr and Upwork (among many others) can potentially help you do exactly that.

**4. Control your calendar—and your access.** Instead of outsourcing your scheduling tasks—which could take longer to explain to someone than doing them yourself—sharpen your skills here. One idea: Set your default meeting time to just 15 minutes. Starting with a short window can force you—and the people who want a piece of you—to think about how to use the time optimally, well before the call or meeting takes place. Also see whether “themed days” work for you—all calls with one group on Monday, another on Tuesday and so on. Grouping around themes can hone your focus.



Web-based schedulers (one example is Calendly) can direct people to a page where they can book a call or meeting with you based on your preferences and have it automatically placed in your calendar. This eliminates the annoying back-and-forth that inevitably occurs when scheduling.

## CONCLUSION

Is it vital to maximize the efficiency of all aspects of your life? Probably not—and trying to do so might just drive you crazy. That said, there are some fairly basic steps you can take to free up time and energy, reduce errors, and give yourself some extra space that you can then devote to pursuing your best life—at work, at home and out in the world.

\*Nick Sonnenberg is not associated with Fidato Wealth, LLC.

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