

How to get the most out of Business Sorter

1. If you're stretched, you may want to limit yourself to three or four objectives. Once you have completed those, you can create a new plan.
2. It could be hard to achieve your objectives and meet deadlines if you set all the due dates on your core tasks within a 2-3 month timeframe. Spread the due dates out, taking into consideration available resource, holidays, and day-to-day business demands.
3. If you have other people working for you, delegate as many tasks as you can. It's great for people's learning and development, and even partial completion or working as a team can be a timesaver for you.
4. Review and update your plan regularly, using it as a working document.
5. Book weekly or fortnightly meetings to review progress, or include the plan review as part of your existing individual or team meetings.
6. Add task completion dates and reoccurring meetings to your calendar as reminders.
7. Diarise to take a look at what your team are doing between meetings, or when you know deadlines are falling due, so you can send a friendly reminder if there is little or no activity, or a positive message when they are working to plan.
8. If you use the plan review as an opportunity for people to shine, you're likely to create a stronger working relationship and get greater engagement from people. To do this, ask colleagues to review each section they are assigned to, explaining where they are up to and what still needs to be done to achieve the objective. It can also be a good time to ask if they need any support.
9. If people aren't getting to their core tasks and achieving their objectives, it can be an early warning sign of an underlying issue(s). Early detection and action can save considerable time and cost. It could be that they are just too busy at that point, but if it continues it may be time to:
 - Review their workload and resource requirements.
 - Consider a time management course if resourcing levels are okay.
 - Consider their suitability and skill match for the task, and if support is needed.
 - Ask questions about health and wellbeing, or if there is something wrong in relation to their role.
10. Before creating a new plan, review the plan you've just worked on. Remember to check the notes section at the top of the plan for thoughts and ideas you have saved, as they may be important to consider for your next plan. Reflecting on the events that have passed, and things that have gone well or not so well, is extremely valuable when you do a SWOT or before you start your next Business Sorter planning session.