

Are Your Gadgets Really Saving You Time?

Pam Vaccaro, MA, CSP

It is still early in the year and your promise to get yourself and your office more efficient and organized is still in the forefront of your mind. You have seen other physicians carrying around their nice leather planners, but more and more have iPhones, Blackberries, Palm XXX or whatever number it is up to now!

Perhaps you have a system you like, but wonder if it is maximizing your efficiency. Even if you are sold on your personal organizer, you might want to review these comments to see if you are really using your written or electronic system as a true organizing tool or somewhat as an expensive calendar/to-do list! Whatever system you choose, you know that your personal life and the demands of your practice increasingly challenge you to manage multiple priorities, deadlines, and events. You need a good tool to help out. What is the best prescription for you?

This article focuses on personal organizing systems. If there is a question about going electronic for all other organizing systems in the “front office,” the answer is YES. Spend as much time on training, as much money on software, and as much encouragement that everyone buy into the systems as possible. No matter what the size of your practice, scheduling, billing, and contact management systems don’t need to be overstated, but should be state-of-the-art for your situation. A savvy assistant or colleague can advise you on these if you don’t know what’s available for physician offices. *Microsoft Office* and *ACT!2000* are basic systems for many of your organizing needs.

It is likely someone else, not only schedules your patients’ appointments, but also your meetings, conferences, and even social events. And then again, you might be thinking...“wouldn’t that be nice!” What about other commitments such as personal priorities, correspondence, articles to review or write, a family priority or time for just you? Of course you want your life to be more than a series of scheduled events. The personal organizer—written or electronic—offers to assist you in doing more than just doing!

Use your clinical talents to determine which system—manual, computer or palm-held—is best for you.

History

What is your history as a planner? Do you plan your priorities, schedule them, work off a master project plan, or does planning mean that you know your appointments and calendar of events? Has planning meant a daily to-do list based on upcoming activities and deadlines or is there a larger game plan involved?

Exam

How are you using your current planner? Are most of your entries appointments?

Is your planner/calendar always somewhere where you aren't? Are you writing on little scraps of paper until you get back to your planner?

Does your calendar need to interface with someone else's calendar on a frequent basis? If you use a written planner system, are you stuffing important papers and notes in the appropriate, dated pages? If you use an electronic planner, where are the important pieces of paper?

How mobile are you in your work? Who has access to your planner/calendar besides you? Do you write a to-do list and are most of the to-dos urgent?

What's working, what's not?

Diagnosis

The first thing to diagnose is whether you really want a planner or just a calendar. Any calendar system tells you where you need to be when and with whom. If you merely want to know your appointments days and months ahead, a simple calendar system is all you need.

A planner system asks you to go deeper—know what you want to do personally and professionally—and set up a plan of action using the planner. Either objective can be met electronically or manually, but this diagnosis must be made before going to the next step. Most of the major planner vendors, such as Daytimer and Franklin Covey, have manual and matching electronic versions of their planner system. Caveat: be careful about buy these systems unless you are serious about being a planner, not just a scheduler. You will be wasting your money.

The second thing to diagnose is how mobile you are, This does not automatically mean you use a palm-held device. Many manual systems are more appropriate for on-the-run docs. A good electronic planner demands you spend time at your computer system.

Palm Pilots are great, but most physicians use them as quick schedule checks rather than planners.

The third thing to diagnose is the need to have others interface with your schedule. This does not preclude you use an electronic system, but it might mean you have a scheduler/calendar process in addition to your planner.

Prescription

Any good remedy for getting organized involves these components: areas to schedule monthly, **plan** weekly, and **adjust** daily. In addition your system will have an "everyday file" for the papers that go along with the to-dos. Anything less than this address some of the symptoms of being disorganized, but are not systemic remedies.

When to prescribe an electronic **calendar** system:

- when you are only interested in your schedule of events*
- when you like nice printouts of your schedule/appointments
- when other individuals have input into your schedule
- when you can't read your own handwriting!
- when you can be faithful to inputting information into your calendar

When to prescribe a manual **calendar** system:

- when your life is really, really simple*

When to prescribe a manual **planner** for yourself:

- when you like to be able to control your scheduling/planning anywhere, anytime
- when you want to plan priorities, projects, keep notes, and see the big picture
- when you don't mind physically rewriting information
- when you don't want to pull information from your computer to make simple entries after phone calls, meetings*
- when you prefer flexibility and portability

When to prescribe an electronic **planner** for yourself:

- when you want to do all the things a manual planner can do, but don't mind a taking time for the learning curve or taking time to "boot" up your computing device
- when you are hooked up to a network system which involves staff or colleagues*
- when you like neat printouts of your schedule and your game plan for the day/week

When to prescribe a hand-held **planner** for yourself:

- when you want all the benefits of an electronic planner
- when you don't mind entering larger amounts of data on smaller keyboards (you can purchase a full keyboard attachment for newer Palm Pilots—hard to carry them in your pocket or briefcase!)
- when you want a portable system you can hook up to your desktop computer*
- when you want the closest thing to a miniature computer for your planner
- when you want simple to do lists and limited project management capabilities

*Indicates most attractive feature

If you are a proponent of any one of these systems, you can surely add to the list. Last caveat! "Be a planner first, and then buy an appropriate planner system if you need one."

Planners of any types are only as good as the plans they support.

Pam Vaccaro, CSP is a professional speaker whose expertise in managing time and attention brings her before audiences internationally. She is a Certified Speaking Professional, the highest earned designation by the National Speakers Association. Her company Designs on Time challenges companies and associations to rethink traditional time management. She is most known for tailored programs and innovative ideas.

www.DesignsOnTime.com

Permission to reprint is granted if this bio is attached to all reproductions of this article.

Pam Vaccaro, MA, CSP