

Better Customer Service Through Effective Time Management

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Being able to manage and prioritize is an important skill when servicing customers. Planning events, activities, and tasks on a yearly, monthly, weekly, and daily basis—that is, prioritizing time—can be rewarding from the standpoint of allowing you to be more proactive in preparing to deal with situations. Such planning can reduce your need to be a crisis manager. It is important on and off the job because, if you do not manage your personal life well, you may carry over personal stress into the workplace. This is not only inefficient; it is also unfair to your employer, peers, coworkers, and external customers.

After you have scheduled key events and tasks using some type of scheduling system (e.g., time management software, written planning system or calendar, or electronic scheduling device that can download information into your computer), review the information regularly to avoid forgetting something.

One way to manage events, rather than having them manage you, is to create a list of activities each day and assign a value to each based on importance. The key is to be consistent and prioritize each day. Some people make planning the last activity of their workday. When they arrive to work the next morning, they are ready to begin rather than spending time preparing.

Guidelines for Setting Priorities

Three guidelines can help you in determining what tasks to do first. These can help you create a realistic and achievable list of daily tasks. As you learned when you read about goal setting in other chapters, goals must be attainable. Use the following standards as a guide when setting priorities.

Judgment. You are the best judge of what you can accomplish in any given day. You know your strengths and what has to be done. When selecting priorities, remember that the ones having the most impact on customers and others should be placed high on your list. On the other hand, do not put so many priorities on a daily list that you will not get them done. If this happens, you might become discouraged and give up.

When you find that you have more high priorities than you have time, you may need to ask for help or guidance from your boss. Many times, simply asking for assistance helps develop your relationship with others. They feel respected and trusted by your gesture, as long as you do not abuse their help or appear to be unloading your tasks onto them. Also, consider other resources that you might use to accomplish tasks (e.g., technology, outside vendors, or customers).

Relativity. Assigning priorities is a matter of relativity. Some tasks and projects are readily rated higher than others. You should be guided by the question “What is the best use of my time?” Many people fill their daily schedule with frivolous or easy tasks and with tasks that they like to do. This produces a hollow feeling of accomplishment. They may get a lot done throughout the day and enjoy doing it, but they have not added a lot of value to customer service or aided in accomplishing organizational goals. Keep in mind when

setting priorities in the workplace that your primary focus should be your customers and activities that support them.

Timing. Reality and deadlines have a way of dictating priorities. The starting time of a project or task also may establish priorities. Once you begin a task, there must be enough time to finish it. If this is not possible, you may have to reprioritize or seek assistance.

Be realistic about the time it will take to complete a task. Make sure that you schedule that much time, plus a little extra, on your daily planning sheet. Also, consider your peak time period for performance. Each person typically has a period of the day in which he or she has more energy and can get more done. Capitalize on your peak period and schedule high-priority tasks during that time, if possible.

Prioritizing System

To set up your own priority system, list all of your pending activities and then group them according to their level of importance. How you assign value to a task is not as important as long as you use the same format each day. Many people use an A, B, C system, and others use a 1, 2, 3 format. Here are suggested criteria for assignment:

Priority A—Must do or critical items. Some things must be done because of management directives, local, state, or federal regulations, importance to customers or clients, deadlines, or opportunities they provide for your success or advancement (e.g., state tax reports, actions requested by a customer, or application for a position in the organization with a specific cutoff date for submission).

Priority B—Should do. Items in this category are of *medium* value. Although they may contribute to customer satisfaction and improved performance, they are not essential or do not have critical deadlines (e.g., mailing an unsolicited information kit to a customer about a new product or developing a proposal for changing an existing system or process).

Priority C—Nice to do. This is the lowest category and includes tasks that are not a direct link to customer satisfaction. They may even be fun or interesting, but could be omitted or left undone. Postponing or scheduling such priorities until a slower time period will likely have little or no impact on customer service (e.g., meeting with team members to brainstorm ideas for a more efficient layout of cubicles, cleaning old e-mail files, or neatly lining up the products on a shelf).

Note: As you go through your e-mail and voice mail messages at the times you have scheduled throughout the day, prioritize them, and add them to your list of things to do.

The key to effective time management is to have a plan and work that plan. If you control your time, you and your customers both stand to gain from your efforts.

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