Work Smarter, Not Harder

Carson Tate, Founder, Working Simply, and Author, Work Simply

NOTE: This peer-to-peer discussion guide is intended to help you collaboratively think through the ideas and strategies Carson Tate presents in this expert class, and apply them to the specific challenges at your organization that you and your colleague(s) face as Senior Leaders.

The dialogue and activities are suggested. Please feel free to adjust them to better suit your needs. As written, this guide will take about 90 minutes to complete (or roughly 15 minutes per section, depending on group size).

Suggested dialogue: We’ve watched Carson Tate’s expert class, “Work Smarter, Not Harder.” Our goal now is to synthesize that information and consider how it might help us better manage our productivity styles at work. Let’s walk through a series of questions and exercises designed to help us do that.

Opening Questions

At some point in your career, you’ve probably felt surrounded by people who seem able to excel more naturally than you. But when it comes to productivity, there is no one-size-fits-all approach. In this expert class, productivity consultant Caron Tate shows us how to manage our various styles to achieve maximum results.

• Discussion Leaders: The goal of opening questions is to get the group engaged and comfortable. This is a whole-group activity—work through the following questions together:

1. How have you traditionally thought of productivity (e.g., a measurement of success, a skill to be mastered, a checklist to complete, and so on)?

2. What productivity skills and strategies do we formally teach at our organization? Which do we require people to develop independently? How successful has this overarching strategy been?
Identify Your Productivity Style

A cognitive style represents someone's habitual pattern or preferred way of perceiving, processing, and managing information to guide behavior. These tendencies provide the foundation for productivity styles, and understanding them is key to working and leading in ways that are effective for you and your team.

- **Learning Objective:** By the end of this activity, participants will be able to identify productivity styles.
- **Discussion Leaders:** This is a reflection activity. Start by asking participants to consider the questions and then writing down their responses.

1. Take a moment to review your notes on the four productivity styles: Prioritizer, Planner, Arranger, and Visualizer.

2. Then imagine your typical workday. How are things arranged on your desk? Your digital workspaces? Are you mostly sitting or walking around? Focused on a single project or coordinating multiple tasks? How important is interaction with others to getting your work done?

3. Looking over the above, which of Tate’s productivity styles do you think describes you best? (You may find you align closely with more than one, but for this exercise, just pick one.)

4. How does your productivity style influence the organizational culture? Are you unintentionally placing expectations on team members that might be ill-suited to their productivity style?
   - If so, how might you give room to other productivity styles?

5. Think back to a significant moment of conflict or tension you’ve experienced as a senior leader, working with a colleague or direct report. What role might your productivity style have played in this? What role might theirs have played?
   - Could this understanding have lessened the tension or resolved the conflict sooner? If so, how? If not, why not?

- **Discussion Leaders:** Reconvene and ask for volunteers to share one thing they learned from this reflection. In facilitating this discussion, keep in mind that people with significant...
leadership experience may be comfortable to varying degrees with looking closely at their tendencies. Help participants progress at their own pace.
Explore Tools and Systems for Your Productivity Style

To maximize productivity, you want to create a workflow that supports your unique attention management needs, working with rather than against your productivity style. And by learning to identify these tools and systems across the organization, we can transform the way we do business.

‣ **Learning Objective:** *By the end of this activity, participants will be able to recognize productivity tools and their uses.*

‣ **Discussion Leaders:** *This is a reflection activity. Start by asking participants to jot down any productivity tricks, tools, or strategies they already use or have used before. These may include software, organizers, planners, a notepad, and so on. Then have them consider the following questions and write down their responses.*

1. Which of these tools do you find most helpful? Why? Which haven’t helped much or feel awkward to use?

2. Thinking back to the previous conversation, are the useful tools a good fit for your productivity style? How so? Do the less useful ones clash with your style?

3. Are there productivity areas where you tend to get stuck? What are they, and why do you suppose you haven’t found effective tools yet? Given your productivity style, where might you begin looking for tools to help?

4. Are there productivity tools that are standardized throughout the organization? How well are they working? Which productivity styles are these suited to, and which are they not?
   
   • If these seem to favor a particular style, what tools, systems, or resources might be needed to support other styles? How might you begin collecting and implementing these?

5. What could you adopt and share with the organization from Tate’s individualized suggestions (color-coding, grouping tasks, and so on)?

‣ **Discussion Leaders:** *Reconvene and ask for volunteers to share one thing they learned from this reflection.*
Push Past the “Shoulds”

Tate suggests taking a hard look at those things you assume you should do and then questioning why they are important. By seeing beyond the veneer of our “shoulds,” we can better understand when it’s best to say, “Yes,” and when it benefits us to say, “No.”

‣ **Learning Objective:** By the end of this activity, participants will be able to evaluate obligations with the POWER method.

‣ **Discussion Leaders:** This activity begins with a reflection. Start by asking the participants to perform a POWER evaluation of a specific obligation in their career.

1. **Name an obligation you have as a senior leader, one you would prefer to opt out of?**

2. **Evaluate that obligation using the POWER method:**
   - **Purpose:** What is the purpose behind this should? Who is driving it? What is it getting at?
   - **Opportunity:** Is there an opportunity behind this should?
   - **Who:** Who is asking this of you?
   - **Expectations:** What expectations come with this should? Do they align with your expectations?
   - **Real:** Is this should necessary? Is it true for you?

3. **Reflect upon your answers to the POWER questions. How do you feel about this obligation now?**
   - Is this particular commitment something you must do? Something you can opt out of?
   - Something you can minimize or delegate?
   - Based on your answer above, how you will deal with this obligation moving forward?

‣ **Discussion Leaders:** Reconvene. Then answer the questions below as a whole group:

4. **Based on this reflection, how can we better utilize the power of no to take back our time?** When saying, “No,” how can we manage it in a way that is productive and doesn’t seem negative?

5. **How can we help our direct reports and employees also tap into the power of no?** How can we build it into our culture so that it improves, rather than detracts, from teamwork?
Manage Across Productivity Styles to Create High Performing Teams

Being aware of the different productivity styles of your direct reports puts you in the driver’s seat for every project. In this lesson, Tate taught us how to encourage collaborations between complementary productivity styles while tailoring our communication styles to each person’s unique needs.

- **Learning Objective:** By the end of this activity, participants will be able to communicate across productivity styles.

- **Discussion Leaders:** This is a reflection activity. Walk the group through each step, giving plenty of time for them to think and work through it. Conclude by asking for volunteers to share one thing they learned from this reflection.

1. **Review the four productivity styles.**

2. **Now, jot down the name of a direct report you work closely with.**

3. **Below their name, write notes about the person’s approach to work and project management.**
   - Try to avoid criticism here—the idea is to sketch out a picture of how they tend to work, without judgment?

4. **Looking over these notes, which productivity style fits them best?**

5. **Now consider the kinds of questions that style tends to ask. Recall that:**
   - **Prioritizers tend to ask “What” questions:** What is the goal? What is the outcome? What is the data? To communicate best with Prioritizers, you’ll need to respond with facts and data.
   - **Planners tend to ask “How” questions:** How has it been done in the past? How do you want me to complete this? How do we use this process or plan? To effectively communicate with Planners, use precise, actionable responses.
   - **Arrangers tend to ask “Who” questions:** Who is the client? Who are the key stakeholders? Who else needs to know this? For Arrangers, be sure to explain who is involved in the process.
• Visualizers tend to ask “Why” questions: Why not? Why is this process better? Why can’t we do it this way? Address Visualizers with responses that focus on context and concepts.

6. In what ways does this direct report’s style differ from yours (if it does)? How do you handle these differences? Where are the disconnects? How could you respond more effectively to their needs and questions moving forward?
Start a Meeting Revolution

Pointless meetings are the bane of the masses. By starting a “meeting revolution,” we can better set intentional goals and achieve them on time while being courteous of everyone’s time. Vive la révolution!

- **Learning Objective:** By the end of this activity, participants will be able to reevaluate their meeting agendas and goals.

- **Discussion Leaders:** This is a whole-group activity. If participants bristle at the suggestion to “revolutionize” their approach to meetings, remind them that the purpose is to analyze what is and isn’t working with their current approach and then refine things as needed. Those changes may be more minor or more radical depending on the current approach.

1. Think of a specific meeting we hold regularly—ideally one whose value several participants question in some fashion.

2. As a group, subject this meeting to Tate’s “Key Meeting Strategies”:
   - Decide which of the five meeting types it is: informational, decision-making, brainstorming, team-building, or skill-development.
   - Question the value or goal of the meeting.
   - Decide who needs to attend to achieve that value or goal.
   - Create an action plan.
   - Determine the ideal length.
   - Customize the environment to best suit the above strategies.

3. Discuss the insights you gained from this exercise. What’s working for this meeting? What isn’t working? What new considerations did the exercise reveal?

4. How might this meeting be altered to better suit its goals and the needs of its participants?

5. Did this exercise reveal other factors that might lead meetings to go off track in terms of focus and utility? If so, what are they and how might we consider them when developing future meeting agendas?