



Gain Control of Your Day

Tools and Techniques for Personal Productivity



How One Individual Improved Productivity and Reduced Stress by 99%: An Interview with Dave Wilkes

Welcome. You're listening to *Gain Control of Your Day*.

The podcast about improving your personal productivity; and where you learn to accomplish more in less time with better quality and reduced stress.

This is Episode 2. From Corporate Employee to Contract Worker to Small Business and Entrepreneur Environments; How One Individual Improved Productivity and Reduced Stress by 99%: An Interview with Dave Wilkes.

Welcome. I'm your host, Fred Castañeda. In this episode, we'll explore the productivity gains from the perspective of a mature, experienced professional; one who's had many years' experience in corporate America, especially in marketing, and then as a contract worker in the high-tech industry; and then, within a small business firm of an entrepreneur.

What's interesting is that Dave Wilkes was skeptical and apprehensive of the value that the Q4 Systems Personal Productivity and Organization and Time Management course would bring him. Oh, by the way, we do have a link in the show notes, so you could see these course details.

However, as we see in this interview, sometimes we learn best when we open our minds and become receptive to other techniques for improvement, no matter how experienced we are or what our roles may be. Let's listen in.

Fred Castañeda: I'm here with Dave Wilkes, who used to be in corporate America. Dave, you served 30 years with IBM?

Dave Wilkes: That's correct.

Fred Castañeda: And then after you left IBM, you were a contractor doing IT work?

Dave Wilkes: With IBM, but I did it for three more years.

Fred Castañeda: And then afterwards, you went into the community and did a variety of jobs with different firms. The last firm you had was with what?

Dave Wilkes: It was with a financial planning company.

Fred Castañeda: Okay. Can you tell the listeners what you did during that time?

Dave Wilkes: Well, actually what I did there was an extension of what I had done for IBM, and that is work with people, for one; scheduling meetings, inviting them to seminars -- just controlling all of that seminar activity right down to the scheduling of venues and the menus of the registrants, as well as all the paperwork that goes with it, the letters before and after.

Fred Castañeda: So you were doing back office work, because I remember you said you were doing operations work; managing a spreadsheet, getting the administrative. Plus, you also did the logistics work of setting up the seminars, as we said right now; and then you also did the work of scheduling.

Dave Wilkes: Right. And what that amounts to is just a whole bunch of coordination. If you had to summarize it in one word, it would be communication; that's an important part of it, too. That's what it's all about is communicating with the right people at the right time on their deadlines, not yours; making sure things happen smoothly. "Problem avoidance" is the term I like to use, where if you do your work efficiently, you don't find yourself going back and fixing things.

Fred Castañeda: Okay. And it seems like you were in a dynamic environment where you had multiple tasks in the air always at the same time, and things -- in this environment, especially in events, which it seems like you were involved -- things dynamically change; get cancelled, rescheduled. My goodness! How could you follow up on it? How could you keep on top of it?

Dave Wilkes: Thanks to friends like you who introduced me to some really nifty techniques and tools.

Fred Castañeda: Okay, fantastic. Can you tell us how this tool that helped you, or what kind of benefit it provided for you in this new role that you had out in the small business community?

Dave Wilkes: Well, in general, what it allows you to do is take care of the things you know need to be done, and as you well know, one of the first things you learn as a new person in the working world is you have to write things down; and you have to learn how to control the information that you gather. Otherwise, it just turns into a huge secondary job of trying to find out where you put stuff.

So if you learn how to control what you know, you learn how to use it such that you can prevent problems. Now you start to get in front of the curve and you make good things happen, instead of always being in "react" mode and trying to recover from something that you could have anticipated, had you had tools like that.

Fred Castañeda: Okay. So it looks like you're talking about maybe the technique of "time linking." Can you elaborate on that and also give some examples where this came in handy for you and provided a real benefit?

Dave Wilkes: Well, mostly, it's just a matter of being convenient enough to just be able to write just enough data to be useful, one time, and then being able to put that information where it belongs so that it's useful to you when you need it.

Having a tool like this also says that I can move things around now. I can move things forward in time or closer in, if it needs to be, even though it's still ahead of time. I can move things that used to be a month out, to just being one week out, very comfortably without having to go through a lot of mental anguish.

The biggest guidance I've learned at a high level is "out of sight, out of mind, but in control." So the first thing I learned is I've got to do things that are going to help me remember what to do, and it all starts with a Things To Do list.

Now the interesting thing about that is it sometimes gets out of sight, and it's always out of order. It's in some chronological order, no priority order, no nothing. So what did we graduate to? Post-it notes. Now we've got something that's never out of sight. But it's always on your mind, and you talk about the mental traffic, the stress, and all of a sudden, what you have is a Things To Do list that's prioritized by color or by physical location on the side of your screen.

So finally, what you got to is your time management thing, that literally helps you put it out of sight and out of mind, but in control.

Fred Castañeda: Keeps you in control.

Dave Wilkes: That's the point. And there's no mental traffic, no stress, and this is not nonsense because I think you know, and your listeners ought to know that after all the years that I've been doing what I've been doing, successfully, I finally learned that there is something an old codger could learn. I came to your course with cynicism.

Fred Castañeda: Right. Now you were an IBM employee for approximately 26 years before you took my course; and during that time, you probably took a wealth of courses in personal productivity, time management, and everything else. But yet, when you came to my course, I know you were a little bit cynical and reluctant, because you said, "What more can I learn, because I've taken all these courses once before." But when you came to that course, tell me, what was your experience like?

Dave Wilkes: Well, it was eye-opening, because the major thing that your course helped me with was to learn to do something without having to change my life. I was able to adapt your course into the things I do on a daily basis without any great revolution in my thinking. It's just a matter of I knew I was going to keep records; and I knew the importance of it. I knew I needed to get prioritized, but boy, that time linking thing really helped me say, "Now you really don't have to worry. I don't have to keep writing things over and over again; transcribing things over and over again."

What it amounts to is that I can just do what I do, very comfortably, kind of like going from a Volkswagen to a Cadillac. You still drive the same, but there's just a little bit of difference, and I noticed it instantly.

Fred Castañeda: Okay. Can I ask you at this time, too, what was the type of job that you were doing during the time you took the time management course? We were at the same department, under marketing, at that time, right? I think you were doing events.

Dave Wilkes: Right, event scheduling, yes. Events was primarily trade shows, and I was 99.9% nationwide, not worldwide; but I did have some input into worldwide events.

Fred Castañeda: Right. You were always traveling and had to have a control book because you had so many events going on all over the place at one time.

Dave Wilkes: Not just the events, but it's the sub-categories of work within the events. As you well know, I needed demonstrators, and that's why I

depended on folks like you. And also, I needed guest speakers, where you also came into play. I also needed executive speakers.

So there are all kinds of different kinds of things that were going on within each event.

Fred Castañeda: Scheduling, planning, people's agendas, people's time, getting commitments, making sure that they are there at the event, making sure travel arrangements, hotel arrangements, and all the logistics that go into an event, you had to deal with. That was your primary job, was to control and ensure that we were properly represented, IBM, that is.

Dave Wilkes: Ensure is the key word, because as much as you plan, that's how much people change their schedules, and have to de-commit, etc., and you never know when. And that's when your control is critical. You really have to know who you can call on a moment's notice, which category they fit in to of speaker/demonstrator, whatever; how reliable they are, and I hate to say that, but it's just one of those critical things.

When you're down at the last minute and you have to get somebody somewhere by Tuesday, and it's Friday afternoon, who do you call and can they really do the job? You need to be able to put your fingers on that information instantly.

Just the experience really amounts to like I said; easing into using another tool. Think of it as more -- I guess a fair analogy would be learning to use a power -- a battery-driven drill or something, where you no longer have to plug something in or get extension cords or whatever. You've got everything right at your fingertips, and you use it the way you've always just done things before. I can't stress that enough.

This course fits into your life. It doesn't require you to fit into its mold.

Fred Castañeda: Now there are habits that we talk about in the course; forming a habit, etc. When you formed these habits of time linking, was it painful? And if so, how painful was it?

Dave Wilkes: It was just different; and the only reason it was different is because I had never figured out how to do it before and make it work. With Post-It notes, you could time link by sticking a note right on top of the other, partially covering it. And prioritization-wise, I could easily move the note from the bottom of my screen to the top of the

screen, and I could color code them, red, yellow, and green, or whatever.

But the fact is it was just a nice way to write things down one time, as you used to love to demonstrate, carrying that little pad in your pocket, and write that note down one time, and then put it where it belongs in your folder.

Fred Castañeda: Okay, let me ask you a question on that, because that's a very interesting topic. For instance, we have listeners here that are in the small business/entrepreneur/podcast or online marketing community, and Dave, do you think if they used this system, they could get that point where they're going to be in control, and then eventually, once they gain control of their day and gain control of their life, then they can separate the two and have a personal life and have a business life, running their business as entrepreneur, and then they could be in the same format as you?

Dave Wilkes: The short answer is yes, of course. The reason for that is there's no difference.

Okay, you can choose to do it your way, which I noticed was extraordinarily effective, because you did have your personal and your business things tied. I just chose not to do that. I said, "That's a personal thing. I won't put it in here." That's why I said it's so easy to migrate to using this, because it doesn't cause you to change what you do; other than to do what you know you wanted to do anyway, and that is, first and foremost, write it down. Take notes so you can refer to them later. But how do you get them prioritized? How do you get them in the right order? How do you get them in the right categories? How do you just keep up with change?

As you and I well know, every time something's committed, the day before it's due --

Fred Castañeda: A wealth of changes.

Dave Wilkes: Yes. But the bottom line is, yes, absolutely anybody can use this for everything, or for portions of things, if they wanted to ease on into it. The thing I would recommend is to do what I did. I followed your lead and tried doing it for everything and found out it just didn't appeal to me, not for the personal stuff. And yet, it was extraordinarily invaluable for getting successful in gaining control of the responsibilities I needed to gain control of.

Now what that does from a professional sense is it makes you more valuable, because all of a sudden you're capable of taking on more responsibility.

Fred Castañeda: And that's good to know, that the system is flexible enough to allow you to actually do that, to be able to work it into your personal life totally and mix business with it, or to keep them separate.

Dave Wilkes: That was the other thing that came about. The value, to me, is how to deal with the monthly things that you deal with in detail, as opposed to the things that you need to be reminded of that are several months out. They're critical things, but there's no detail to be added this moment.

So you need a little tickler that says, "Be sure to contact Fred in May to see if he can make the June show." Now, we don't even know if the June show -- it's not even booked yet, right? But the fact is, I've got to start contacting, or thinking about contacting people. Who am I going to call for demos? Who am I going to call for hardware? Who am I going to call for guest speaking/executive speaking engagements?

And it's things like that that you can handle in detail for the current month, and then at a higher level for far-out dates. But I can't say it enough, Fred, and you've really made it a part of my mantra, out of sight, out of mind, but in control. "Come June, I'm going to call Fred and do this, and then in August, we're going to talk about the October fourth quarter whatever."

Fred Castañeda: That little adage that we always talked about in the course that said "Record the information in a place your mind trusts" so it takes place and nothing slips through the cracks.

What was the experience you had? By putting this into practice, what did it do for your stress levels?

Dave Wilkes: Oh, boy; how can I say it in words?

Fred Castañeda: It reduced them or freed them up?

Dave Wilkes: Yeah. I can't say 100%, because it freed me up to take on other stress.

But the fact is, quite literally, you know when it gets down to something big, like a trade show, where you have an extraordinary amount of detail in many different areas --

Fred Castañeda: With deadlines.

Dave Wilkes: -- with deadlines, that's critical; the stress level simply disappeared in those items. It really did.

Now the other things were things that this course couldn't help you with is how much detail is involved in the next job. Well, until you find out, there's that stress level. But as soon as you start finding out details, you already know where to put them, in your binder, in your calendar, to take care of them. So there's no more stress. Once the mystery goes away, once the facts are found, or at least a direction is determined, then you're very comfortable just saying, "Okay, it's just another task. I'll put this where it goes."

Fred Castañeda: Dave, you were an IBM employee. You retired six years ago. You were also an IBM contractor, and you worked for another three or four years as a contractor. Then you went out into the business world of small and intermediate business, and give me your experience. Did you use it in those environments where you're contractor and out in the business community on-site of IBM? What did it do for you?

Dave Wilkes: Well, I was amazed to find out that there's nothing new in the world, and I shouldn't have been; but instead of organizing trade shows, I was organizing seminars, and I was taking care of a whole lot of folks. And within that financial planning business, there are different types of activities that you get involved in, and it's the same story.

They may have different names, but there are different segments of a job; they all have different things that need to be done on different schedules with different deadlines, but it's the same kind of process.

Fred Castañeda: So you had deadlines that you had to meet; you had people that you had to contact; you had seminars that needed to be scheduled, with meals, I think, so there's a meal there; and then you also did the back office operations. I think you were the operations guy for your company, right?

Dave Wilkes: Right.

Fred Castañeda: So you had administrative as well as tactical as well as logistical responsibilities. You were a jack-of-all-trades, master-of-none, but you were doing three jobs for that small entrepreneurial outfit, right?

Dave Wilkes: You can call it what you want, but literally, it's a matter of are you dealing with people? Are you dealing with budgets? Are you dealing with schedules? And really, it's project management 101.

Fred Castañeda: And this system helped you because it fit right into your pattern, your paradigm, and you were able to still be productive, right?

Dave Wilkes: And still be stress-free. That's the difference. You can go from one environment to another. Just learn the nomenclature; get into the jargon; whatever the semantics are, whatever, but everything still falls into this type of activity.

All I can guarantee you is that because of the reduced stress, I was definitely able to do much, much more. I'd love to say 100%, but what I can tell you is that I was at least 99% less stressful.

When you say out of mind and out of sight, not worried about it, and in control, those two, the last two are critical. It says, "Look, I don't have to be looking at this every day to be confident it won't fall through the crack. I know I'm going to find it when I need it, and I know what to do about it. I'm in control." And that gives me 100% less stress.

Fred Castañeda: So basically what you're saying, a big benefit here was to get the mental traffic of these details out of your mind; the system does that for you, allows you to focus on what you're doing, and therefore reduces your stress because you're able to accomplish more in less time with better quality.

Dave Wilkes: And you kind of glossed over focus on what you're doing, but that's exactly what it lets you do, is to do what you're doing, and stop worrying about what else should I be doing, or what else should I be doing next? And if our audience stops and thinks about it honestly, doesn't that happen a lot to you these days, where you're busy doing something, and all of a sudden, your subconscious starts telling you, "Don't forget to do whatever," and the answer is tell your subconscious to take a break. "It's okay; I'm busy doing what I should be doing. And when I've done this, I know exactly what I'm going to do next. But I don't have to think about it before then. I'm going to focus," and that's the word you use. That's an excellent word.

Fred Castañeda: So therefore, this basically eliminates one of the big time-wasters, which happens to be churning; churning around and just worrying, worrying, worrying and not focusing.

Dave Wilkes: Right. And doing things a million times.

I mean, how many times have you been told, "Pick up a piece of paper one time. Don't handle it multiple times." Well it's the same thing with a task. Pick it up one time and decide when it's going to be done, and do it. Down the road, when I get to the next activity, I know that that's all I need to know. So there's no stress whatsoever.

That sounds kind of crazy, but it's really true. There's no stress. It's just pure factual appearance of what did you write down for today, who needs to be called, what needs to be done, what needs to be started -- what efforts you -- you begin at the beginning on calling venues to schedule seminars, or calling venues to schedule trade shows, right? What people you might have as a guest speaker, what menus might you be dealing with, what time frames, what logistics with regard to tables being set up, the water on the tables and tablecloths; and all that detail. You just work on it when it's appropriate, put where you put it -- where it belongs, which is a sensible place for you, using this tool, because it is that flexible; and then, when it's time to use it, magic happens.

And there are no last-minute things that cause stress because you've already pre-empted them. You've prevented problems, you've avoided problems, by thinking through and focusing at the moment what needs to be done, and then, when a last-minute change comes in, it's not a big deal.

Fred Castañeda: So you've been involved in three types of projects: projects for logistics, which is the scheduling and everything, and making sure the details are worked out for the events; also, event planning; and also, the back office operations that you had, which is running spreadsheets, running reports, calling people, coordinating -- you've got three different types of projects that you were running in this operation. Sounds like you were doing three jobs at once. And this tool helped you?

Dave Wilkes: Of course. But everybody does that, and that's probably why everybody's stress comes in, because they don't see that that's what they're doing as well. Everybody does that.

Fred Castañeda: You're actually practicing the technique of time linking, then.

Dave Wilkes: Absolutely. It's all a matter of you getting done what you need done, but you have to remember to link that to the things that you need to do for the other folks on the other end of your job to do what they need to do and get their work done.

Fred Castañeda: Let me ask you this question, because we've gotten this from some of our listeners, and that is, in a small business/entrepreneurial type of environment, they sometimes get this feeling that they're totally overwhelmed because they've got too much to do, they don't know where to start, and it starts eating at them.

Time linking is the technique that we use in this class. Any words of recommendation for them? How long do you think it would take for them to basically get out of this feeling of feeling overwhelmed and be able to control their day?

Dave Wilkes: If they listen to you, and if they know themselves; which gets back to how do you think and how do you blend this tool into your day. That's the key thing, is to understand how you think, to begin with. How do I categorize things? And then simply you this tool to blend right into the things you do, the way you do, and all of a sudden, things become under control. Stress starts to dissipate and disappear, and all of sudden, things start to happen. And you get more productive because now to know that for this to happen, I have to do this first, so let me link these things and say, "Okay, now I'm ready to go. I'm in control. I'm not going to worry about that until next Tuesday," because that's when it's appropriate.

Fred Castañeda: In your experience, Dave, how long did it take you to get into the habit where it was almost automatic to do time linking?

Dave Wilkes: The honest answer is about two months. And here's how that worked.

The first seven weeks was for me to stop trying to push back on you sharing that with me. And then after that, it took about one week for me to get comfortable with the idea that that really works. If you just try it out and use it not as something radically new, but just as something --

Fred Castañeda: As an extension?

Dave Wilkes: -- as an extension of what I was already doing. Don't try to recreate the wheel. Don't try to reinvent yourself or revolutionize your day. Simply do what you always do, but now you've got another tool. Like a flashlight in the dark; now you can work at night.

And it's really just a great extension of what I always did, once I got past the idea that I didn't want to learn anything new from somebody, because I knew it all. You don't want to be spending time spinning your wheels, reviewing things that you could have handled the first time, and to set aside, and that's why I love this;

because you handle things once, put it where you know it belongs, and then, just to get back to your mantra, it's out of sight, out of mind, but you're in control.

Once you start to believe that, and once you start to appreciate the time linking that says, "Yeah, I know. I've got a million different things to worry about on that, but I got the first one handled. It's already scheduled for Tuesday. I'm in control. So I'm going to close this book on Friday, and come back to work Monday, and not even think about that until Tuesday."

Fred Castañeda: Okay. And you said something very interesting, which for our listeners, I think is a very valuable idea; and that is since a lot of the people in small business/entrepreneurial situations and environments work at home, this tool will allow you, basically, to do a virtual separation of your professional with your personal life, and you've been able to do that.

Dave Wilkes: Well, I chose to do that, and I chose to do that deliberately, and that was part of my cynicism, too, thinking that I had to do everything this way; and the answer is I could, and it works efficiently. I've seen it work with you.

The fact is, it works; and the beauty of it is it works for you and it works for me, and we work very differently. And yet we still accomplish just as much in a very comfortable way, stress-free. I would even argue because you have less stress, you become much more productive, and the next thing you know, you get more opportunities to be a manager; because they say you can handle these things without going over the edge.

Fred Castañeda: Or, you can free up time to do whatever you want to for yourself, right? It's your choice, right?

Dave Wilkes: And free up time and schedule time, actually, to take a break and think. Because that should be a large part of what we do, but frequently we're too busy doing stuff to think much.

Fred Castañeda: And that's where creativity comes in, especially for the entrepreneur, the small business environment. You need to be creative and you need to have that think-time or that creativity time available, so you can free up time to be creative.

Dave Wilkes: And in conjunction with that, also as we said before, you have to be able to focus. It's one thing to think and plan your work, and then it's another thing to work your plan; and that focus that says, "I don't have to worry about anything else right now except doing

what I'm supposed to be doing. Let me do it well. Let me do it efficiently and effectively, and when that's done, I'll either note when the next step is, or what that is, with whom, whatever; and then I'll move on to the next item of the day, and effectively do that." All of which is stress-free.

And you know what? It really gives you a personal sense of satisfaction. I mean, to talk about an upward spiral, it's one of those things where -- I was going to say you enjoy your work more, but let's just say you stop fretting about your work, you stop worrying about your work. You just start doing it stress-free, and then brings success, and success brings satisfaction. So you're on an upward spiral now that says, "This is really fun. I can handle this," whatever this is.

Fred Castañeda: Okay. And it looks like you're able to do more in less time with better quality and with reduced stress, which is what time linking gives you as a benefit.

Before we part from our listeners, do you have some final words as to how you would recommend for them to gain control of their day using this particular tool?

Dave Wilkes: One of the first things you can do to help yourself is to really take the time to get to know yourself, and appreciate how you typically do things. Essentially, how you categorize. And I think I've told you before, with my project management experience, I'm pretty much into an automatic -- "Is this a people thing or a money thing or a scheduling thing," right? Just how you categorize things, where would you put them; the time linking and the tool itself helps you put them in the chronological order. You use very little extra effort to put it in some prioritization order, and you just forget about it. Just put it where it belongs and get to it when you should.

Fred Castañeda: You earned the right to forget about it.

Dave Wilkes: And actually, you earned the right to know in your heart and sleep tight knowing that you won't forget anything. You're setting it aside to a more appropriate time where you can focus on it and do what needs to be done, effectively and efficiently.

Fred Castañeda: Okay. Well, good words of wisdom for our listeners, and I know that you, having been 30 years in corporate America, another three years as a contractor, and then the last three or four years in small business America, wonderful words of wisdom and good experiences.

Dave, I'd like to thank you for your time.

Dave Wilkes: Well, I'd like to thank you for your time management.

Okay. But seriously, Fred, it's my words of wisdom: get to know yourself; give Fred the opportunity to share with you a terrific tool; understand that this tool is not a revolutionary thing; it can fit into your life however you choose to use it. It works for you. It's not the tail wagging the dog. Give Fred your attention, and he'll just help you do what he did for me.

Fred Castañeda: Okay. Dave, thank you very much.

Listeners, this has been an interview with Dave Wilkes, who as been a part of IBM for 30 years, and has been working also in the small and medium community environment doing logistics planning, project management, events planning, as well as back office management.

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