

The Above & Beyond Series: Customer Service Articles



Getting Organized: Paper Vs. Electronic Planners

I recently visited a colleague who would win honors, hands-down, for her purposeful use of Post-Its in her office space. She has successfully papered her desk, partition walls and computer monitor with squares of Caribbean color. “Isn’t it great?” she exclaims, “Each color represents a different project I’m working on!” She seems to be comfortable with what looks like chaos to me.

How efficient are those who litter their desks or their days with hand-scribbled notes? Can they access information needed to serve customers quickly, accurately and thoroughly? Studies show that note-lovers can be as productive as any electronic gadget user and could be even more efficient. If you aren’t as confident as my co-worker in your use of scrap paper, read on to decide which task/event tool is right for you.

- Wall or desk calendars aren’t a good solution for most people because they’re not portable; their best use is for a quick visual overview of the month. The exceptions are those who work from one location all of the time.
- Spiral notebooks or legal pads work best for people who don’t need to plan more than a day or two in advance. If you have to capture hundreds of tiny requests coming at you daily, a notebook might serve you well.

Paper or Palm?

Paper planners work best if you’re a visual/tactile person. You fit this category if:

- Your thinking flows easiest when you’re writing things down.
- Putting pen to paper helps you remember better.
- You tend to recall where on a page you wrote something.

Benefits of paper planners: You can enter information pretty quickly with a pen; paper planners are generally less expensive than electronic devices; and you can keep old pages as a record of the year.

Electronic planners (i.e. Palm, iPAQ, Visor) are good for linear/digital people. You fit this category if:

- Your thinking flows easily when you use a keyboard or a stylus.
- You’re more likely to look for something through a word search than trying to remember where you wrote it.
- You have a good memory for dates, numbers, and chronology without needing a visual overview of a full month or week.

Benefits of electronic planners: Lightweight and compact, electronic devices allow you to move information without rewriting, retrieve entries by typing in a keyword and back up the contents on your computer.

Portability is key in today's world. Look for the smallest system you can find that takes into account the number of daily to-dos you want to track, as well as the size of your handwriting. If you use a paper planner, carry only two months of daily pages at a time.

Pointers for Using Any Planner

- Schedule when you will do each task. A to-do not connected to a date simply doesn't get done. For every task, ask two questions: How long will this take: When will I do it?
- Keep it neat. Writing in an attractive, legible hand will allow you to read your list later. Slowing down forces you to think through each task and decide: Is this really worth doing?
- Bear in mind that no system is perfect. Pick one planner you really like, customize it to your heart's content, and then learn to live with its foibles.

Source: Morgenstern, Julie. "The Cure for Chaos." O Magazine January 2003: 67-68.