



**OCEAN  
DISCOVERY  
INSTITUTE**  
*young lives transformed through science*

**INTRODUCTION TO  
POWER MANAGEMENT WORKSHOP  
(PMW)**



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## AGENDA

- 🔹 Background
- 🔹 Philosophy, Purpose, and Results
- 🔹 Key Distinctions
- 🔹 Tools and Use
- 🔹 Setting Up Your Tools
- 🔹 Reflection and Questions

# BACKGROUND

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**Marie-Jose Kaasenbrood, Partner**



**OTC<sup>®</sup>**  
International

# OCEAN DISCOVERY'S CORE COMPETENCIES



## Community Driven

Is dedicated to meeting expectations and requirements of internal and external partners; Acts with the mission in mind; Establishes and maintains effective relationships (students, donors, volunteers, partners); Gets first hand information to improve services; Is available and ready to help



## Approachable

Is easy to approach and talk to; Puts others at ease; Can be warm, pleasant and gracious; Builds rapport; Is a good listener; Demonstrates empathy



## Trusted and Demonstrates Integrity

Does what they say they will do; is seen as direct and truthful; Candidly presents the truth in an appropriate and helpful manner; Keeps confidences; Is not knocked off balance by the unexpected



## Committed to Work Systems

Is dedicated to organizational systems and practices (including PMT and PMW); Seeks to align work to organization processes; Delivers high-quality work; Is committed to continuous improvement; Is open to suggestions and experimentation



## Action Oriented

Enjoys working hard; Uses his/her time effectively and efficiently; Is full of energy for the things that they see as challenging; Is intentional but not fearful of acting with minimal planning when needed; Seizes opportunities



## Organizationally Agile

Understands the organization culture; Knows how to get things done through formal channels and informal networks; Understands the origins and reasoning behind policies, practices, and processes; Can attend to a broad range of activities

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# PHILOSOPHY, PURPOSE, & RESULTS

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# PHILOSOPHY

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# PURPOSE

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The purpose of the Power Management Workshop (PMW) is to provide you with tools and practices that allow you to be powerful, fulfilled, and at ease regardless of what and how much there is for you to do.

# THE RESULTS

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In applying the tools and principles of PMW, you will be able to:

1. Focus 100% on the work you are doing now
2. Manage everything there is for you to do, not just emergencies or what shows up in your face but also short and long term goals.
3. Manage and minimize interruptions and distractions.
4. Capture each new thing that needs to be done or comes to mind.
5. Have the power to prioritize and make decisions
6. Deal powerfully with what you are not doing accomplishing
7. Automate repetitive actions
8. Complete fully what you do so it does not return undone
9. Successfully integrate professional and personal life
10. Produce unprecedented results
11. Go to bed at night satisfied with what you have accomplished during the day

## Reflection

- Which results stand out to you as being something you would like in your work or personal life?
- What excites you?
- What do you think would be a challenge or barrier for you?



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# PMW KEY DISTINCTIONS

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# PMW KEY DISTINCTIONS

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Integrity/Face the Beast

Reliably In Existence

Do Complete Work

# BE A PERSON OF INTEGRITY

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**Integrity:** The condition of having no part or element taken away or wanting; undivided or unbroken state; wholeness, completeness, entirety. ~ The Oxford English Dictionary

(aka Doing what you say you will do)

# FACE THE BEAST

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**Facing the Beast:** Identifying all there is to do, prioritizing what is most important and deciding what you will do, putting them reliably in existence, and having power over those things left undone.

# RELIABLY IN EXISTENCE

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Time, Space, and Matter

Two things can't exist in the same time and space

**Reliably in existence:** All steps involved in a given task are scheduled in your calendar (or temporarily on your recording tool) while looking at time realistically and completely, such as drive time, prep time , post-event thank you's, etc.

# DO COMPLETE WORK

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- **Automated:** Something that is ongoing and cannot or should not be 100% complete and everything that can be done now is done now, and the rest is reliably in existence.
- **State of completion:** Something that cannot be 100% complete and everything that can be done now has been done now and the rest is reliably in existence.
- **100% complete:** Something is 100% complete when it ceases to exist as a concern.

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# PMW TOOLS & USE

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# PMW TOOLS

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- Recording Tool/Clipboard
- Communication (Manual, Emails, Calls, Meetings)
- Outlook Calendar

# PMW TOOLS: RECORDING TOOL

Your recording tool is your “catchers mitt”. On it, you empty your mind so you can focus on the task at hand.

- Front Page – Is everything you are doing that day

## WRITE EVERYTHING DOWN!

At end of day, you Empty Your Recording Tool

- Tasks are moved into your calendar with space and time.
- You decide to delegate, delay, or delete.

August 1

9 Staff meeting  
11 Email  
1130 Drive  
12 OSE focus group at Clark  
1 Debrief w/ staff  
30 Drive/calls  
2 Buffer  
220 Emails  
3 Enter meeting notes  
330 Send RTC invites  
430 Emails  
5 Empty recording tool  
530 Drive  
6 Yoga

Emails	Calls
inc. Mr. D	Drew 619-595-2351
*Kristen E.	

# PMW TOOLS: COMMUNICATION

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PMW helps give time and space to work responsibilities. But where do these responsibilities come from?

- EZ Reports
- Task Tables
- CAMP II
- Meetings
- You!

**Where else may your responsibilities come from? Practice here and free your mind. FACE THE BEAST**

- Use your Record Tool and jot down your ideas.
- Also jot down anything that is on your mind or has been on your mind today.

# PMW TOOLS: CALENDAR

Your calendar is “reliably in existence”. Notice how tasks have space and time and there’s no overlap.

	17 Monday	18 Tuesday	19 Wednesday	20 Thursday	21 Friday
8 <sup>am</sup>				Drive	
9 <sup>00</sup>	Email Weekly Meeting Prep	Email Prep Intro for Program and Pack Supplies Due 10/19	Email Staff Meeting	Capital Campaign Meeting with John Life Technologies Building - Mtg. Notes Due 10/21	Email Prep for Staff Retreat Due 11/10
10 <sup>00</sup>	Evaluation and Reporting Update Due 10/23		Buffer	Drive	
11 <sup>00</sup>	Monthly Papi Clean Up	Inc Jim Donation End of Year Celebration	Enter Notes	Email	Evaluation and Reporting Update Due 10/23
12 <sup>pm</sup>	Submit Supply Request Due 10/15	Supervisor Meeting	Evaluation and Reporting Update Due 10/23	Research Best Practices Due 11/1	
1 <sup>00</sup>	Email/Do	Email/Do	Email /Do	Email/Do	Email/Do
2 <sup>00</sup>	Think of Ideas for End of the Year Student Celebration Due 11/15	Enter Notes Database Contact Entry	Drive Attend Program - Lead Intro	Buffer Time Weekly Program Team Meeting	Research Best Practices Due 11/1
3 <sup>00</sup>	Empty Recording Tool/Email	Empty Recording Tool/Email		Enter Notes	Enter Notes Prep Calendar for next week
4 <sup>00</sup>				Send John Mtg Notes Supervis	Empty Recording Tool/Email
5 <sup>00</sup>			Debrief	Empty Recording Tool/Email	
6 <sup>00</sup>					
	Tasks: 0 Active tasks, 0 Completed tasks				

# PMW TOOLS: CALENDAR

The DAY view is the preferred default, to be in the here and now.

	28	Friday
7 am		
8 <sup>00</sup>	Empty Inbox	
9 <sup>00</sup>	Staff Meeting (see notes)	
10 <sup>00</sup>		
11 <sup>00</sup>	Buffer	
	Meet with Supervisor (see notes)	
12 pm	Enter Notes	
1 <sup>00</sup>	Empty Inbox	
	Drive	
2 <sup>00</sup>	Birch Aquarium Training	
3 <sup>00</sup>	Drive	
4 <sup>00</sup>	Emails/Dos	INC Frank James - 858.555.9552
	Prep Materials for Program	Send WA invite to Susan G
5 <sup>00</sup>	Empty Recording Tools	
	Drive	
6 <sup>00</sup>	Yoga	

# BEGIN PMW: SET UP YOUR CALENDAR

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- Set default so Outlook opens to the calendar (not email).
- Set default to “day” view.
- Turn off automatic reminders as you rely on the Recording Tool.
- Share your calendar with supervisor and direct reports.
- Use consistent colors:
  - Blue** = Internal Meetings (can be flexible, but need communication if moved)
  - Orange** = External Meetings (should avoid being moved, and need communication if moved)
  - Green** = Programs (cannot be moved)
  - Red** = Hard Deadlines

There are only a few items that can have only a day associated with them (no set time) which will show up at the top of the calendar. These items may include birthdays, holidays and schedule items - such if a supervisor or direct report is out of the office that day or days when you are onsite/offsite (for hybrid workers).

# BEGIN PMW: SET UP YOUR CALENDAR

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## Reoccurring Items

- Emails/Do
- Inbox
- Buffer
- Empty Recording Tool (plus email)
- Travel time
- Job-specific prep
- Lunch
- Timesheet Prep – bi weekly Fri/Mon before pay day.
- Regular meetings
- Enter Notes post meetings (30 min)
- Exercise?

## Fellow-Specific Reoccurring Items

- Download schedule from EZ Reports
- CAMP II work
- Classes?



**Let's  
practice  
this now!**

# HELPFUL QUESTIONS TO FACE THE BEAST

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- Do I have my direct responsibilities scheduled?
- Do I have my personal priorities/responsibilities scheduled?
- Did I prioritize each item effectively and why it was put in the chosen space and time?
  - YOU make the decisions and your priorities INFORM them.
- Do I have enough time for each task?
- Is there any prep work/follow up needed for items in calendar?
- Who needs to know changes/additions I have made?
- Do I have sufficient space left open for changes/additions?



# HELPFUL CALENDAR TIPS

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- Stick to your time boundaries
  - Note and reschedule
- Move items with integrity and communicate for complete work
  - Who needs to know of changes/additions/out of office?
- Buffer Time
- Due Dates - include in the subject so you can easily see if an item has a due date that you need to consider when moving the task.
- See Notes – When attaching emails to the calendar item or using the body to capture notes, write “SEE NOTES” in the location so you can remember to check there for details.

# TOOLS: EMAIL

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- Check during scheduled time
- Empty your inbox daily
- Daily check “Junk E-Mail” and empty/move to in-box as appropriate
- Do complete work with email (sometimes difficult if responding on your phone)
- Delete when addressed and/or copy into scheduled time to address
- Use “INC” (if no contact) for items you need a response from
- Use “Out of Office” automatic responses and set up folder in your inbox

# COMMUNICATION/COMPLETE WORK

This message has not been sent.

To... YOU

Cc... Shara, MK

Subject: Hologic Event Follow Up

Hello YOU,

Please do the following as a wrap up to the Hologic event you attended.

Send a thank you (today) to Mike Watts with Hologic and copy Ted Griswold.

Email Ted to see if he can introduce you via email to Gloria from Qualcomm and then invite her to Watershed Avengers. Also ask if he has any other contacts that we should follow up with/notes for us.

Put together all your notes/ideas/next steps from the event and the contacts Ted sends you and bring to our meeting next week with Shara.

Thanks!

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# QUESTIONS?

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THANK YOU.

