

# MANAGING TIME, MONEY, & PEOPLE

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## AGENDA

- Starter
- Mind the Money
- Keeping Records
- Can't Do It All
- Conclusion
- Student Assessment

### Objectives

Students will identify strategies for successfully managing money on the job.

Students will recognize the importance of keeping written records of their work.

Students will recognize the importance of keeping managers informed and asking for help when needed.

### Materials Needed

- One copy of the “To Do” activity sheet for each student (Starter)

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**Starter (3 minutes)**

Distribute copies of the “To Do” activity sheet.

Say to students, “Imagine that you have a job at a clothing store. During your shift today, these are the tasks that your boss has asked you to complete. Your shift is four hours long.”

Ask students to describe how they are going to get all of these tasks done in four hours. Ask them to identify ways to make sure that they don’t forget anything or run out of time. Remind students that a to-do list will help them manage their time and ensure that they don’t forget a task or responsibility.

Tell students that their boss has also asked them to count the money in the cash register drawer and match the amount against the receipts. Have students list any special concerns about handling money and state how they will fit this additional task into their to-do lists.

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**Part I Mind the Money (15 minutes)**

Purpose: Students identify effective money-management techniques.

**1. Students identify resources that they might have to manage on a job.**

Ask students to consider the following scenario:

You have been working at a local retail store for the past year. One of the managers recently quit, and your boss has asked you to be responsible for closing at night until he hires another manager. You have been in the store when others have closed but have never done it on your own. Closing is a major responsibility and the first step to becoming a manager.

Explain that at the end of the day, there are many tasks related to closing a retail store or any place of business. Ask students to name those tasks. (Students might respond: vacuum or mop the floors, fold clothing, straighten merchandise on shelves or racks, lock the doors, take out the trash, close out the register.)

Ask students to explain what the word “resources” means in the context of a job situation. (Students should say that it means the time, skills, people, or objects needed to complete tasks.) Remind students that they learned how to manage time in *Module Six: Skills for School and Beyond*, and that time is considered a resource. Ask students to identify other resources that they will have to manage now that they have been given the responsibility of closing up. (Students might respond: equipment, merchandise, people, security, money.)

**2. Students identify strategies for managing money on the job.**

Ask students to identify situations in which they might handle money on the job. Write student responses on the board. (Students might respond: closing out a cash register, running errands for the office, giving change to customers.)

Ask students to focus on one situation listed on the board.

Have students raise their hands when you read the item they have chosen. Group students interested in the same situation together.

Have each group write a dialogue or screenplay that explains why its situation requires effective money-management skills and demonstrates effective money-management strategies. If students are having difficulty generating reasons for having these skills, offer the following suggestions:

- Match receipts to register tapes, checks, credit card slips, and cash.
- Make sure you can account for every penny spent doing errands.
- Customers must get the correct change.

If students are having difficulty generating money-management strategies, offer the following suggestions:

- Count money very carefully.
- Keep an eye on the money drawer.
- Report any discrepancies immediately to a supervisor.

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## Part II Keeping Records (15 minutes)

Purpose: Students recognize the importance of keeping written records and of managing their relationship with their supervisor.

### 1. Students learn some of the reasons for keeping written records.

Tell students that the misplacement of memos and other communiqués is a frequent occurrence in an office. Ask students to list strategies for solving this common problem. Elicit from students that copies of the memo or an electronic file will usually solve the problem. Having a record in a log that shows when the memo was sent will also help.

### 2. Students learn other ways and reasons to keep written records.

Tell students that there are other reasons for keeping written records. Ask students to imagine that they have used their prioritized to-do list, but that they are coming to the end of their shift and haven't done everything on the list. They decide that they've accomplished the most important things and that they'll finish the rest when they come in tomorrow. When they walk in the next day, their boss says, "How much were you able to accomplish yesterday?"

Ask students to respond to the boss's question. (Students should respond: showing the boss the to-do list to indicate what has been accomplished, stating their strategy of completing what could be done.)

Ask students if there are other constructive ways to handle the situation. List additional student responses on the board.

### **3. Students understand the concept of managing their relationships with their supervisors.**

Lead students to understand that the best way to handle the situation is to keep the boss informed. In this example, leaving a note at the end of the shift that details what they had done, what was yet to be completed, and when they expect to complete a task would have made the boss feel that they were managing their time.

Explain to students that this is an example of anticipating the boss's needs and trying to meet them. Help students recognize that if they are proactive about managing their relationship with their supervisor, the supervisor is likely to think of them as good employees.

### **4. Students understand the importance of keeping completed to-do lists.**

Suggest to students that they always keep their to-do lists, even when they have completed them, since they provide a record of what has been accomplished on the job. Ask students to suggest ways to keep all the to-do lists so that they are easily accessible. (Students might respond: keep them in a manila folder, in a computer folder, or in a planner.)

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## **Part III Can't Do It All (15 minutes)**

Purpose: Students recognize the importance of asking for help.

### **1. Students see the impact of scheduling conflicts.**

Tell students to refer again to their to-do lists. Tell them that the manager has just come in and has one more thing he wants them to do. This task is significant and seems to conflict with their other scheduled tasks. Ask students if they think that they are getting overbooked.

### **2. Students discuss ways to deal with scheduling conflicts.**

Ask students to suggest solutions to this problem. Write student responses on the board. Lead them to understand that:

- Doing nothing means the problem will not be solved. In addition, the boss will be upset because he will expect the task to be done.
- Students need to ask for help, but they need to do it in the right way, using good communication skills.

### **3. Students learn how to ask for help.**

Ask students how they feel about asking their boss for help. Write student responses on the board. Explain that sometimes people think it is a weakness to ask for help. Tell students that a responsible employee will bring scheduling or priority conflicts to their boss for help resolving them as soon as they are known.

Ask students if they see a good way to bring this problem to the boss's attention. Elicit from students that the best way to approach their boss is to have the problem laid out so that it is easy to understand. One of the best ways to do this is with their to-do lists. They should show the boss how they have prioritized everything and estimated the time required to complete each task. The boss will more quickly understand the problem and will help with prioritizing or changing some tasks.

Point out to students that this involves managing the relationship they have with their supervisor. Putting the scheduling conflict in writing will help the boss more quickly understand the conflict and demonstrates respect for the boss's time.

### **4. Students practice asking for help.**

Ask students to find a partner. Tell each pair to alternate being the boss and the employee. Have them role-play asking a boss for help with prioritizing all of the new tasks they have been given. Remind students to practice managing their partners by anticipating their needs and trying to make their jobs easier.

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### Conclusion (2 minutes)

Ask students to list strategies for managing time, money, and the people they work with at their job. Elicit from students the following **key points** that were taught in this lesson:

- Planning, scheduling, and managing money are very important on the job.
- Keeping written records of your work can contribute to a good relationship with a supervisor.
- Asking a manager for help on the job can be important to success.

### Student Assessment

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1. Describe two strategies for organizing your time.
2. List three reasons why you should keep written records of your work.

## LESSON EXTENSIONS

### Using Quotations

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“A stitch in time saves nine.” —Benjamin Franklin

Explain to students that while making lists and prioritizing is effective, sometimes you must drop everything to take care of something more urgent. Brainstorm with students about how to handle these situations.

### Addressing Multiple Learning Styles

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Have students think about the day as divided into thirds: eight hours rest, eight hours work, eight hours of free time. Ask, “Is this schedule possible or impossible to keep?” Explain to students that although this is the ideal, there will be times in their life when this will not be possible.

Have students create pie charts and bar graphs comparing the actual division of their day to the ideal division of their day.

### Writing in Your Journal

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Have students write about how long it takes them to get ready in the morning. Have them consider how much time they spend looking for something to wear, homework, or change for the bus.

Have students figure out what they can do the night before that would make their mornings easier. Have them make a checklist and stick with it. Have them see if they save time and are less stressed in the morning by doing some preparation the night before.

## Using Technology

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Show students how a desk calendar or planner—seemingly low-tech devices—are time savers and important to any business.

Invite students to investigate and report on other types of organizers, from a simple telephone list to a contact list and calendar in Microsoft Outlook.

## Homework

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Have students keep track of the time they spend on activities that they choose to do and those that they must do.

Discuss how students' time is spent. Ask students if they have ever heard someone say, "Do the things you have to do so that you can do the things you want to do." Have students describe how this saying relates to them.

## Additional Resources

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Divide students into groups to investigate time in sports and leisure. Have one group list sports that rely on time. Have another group list leisure activities that rely on time (such as TV shows, films, or songs).

List the findings on the board. Which activities have more flexibility regarding time? Why?



# TO DO

**The following is a list of tasks that you must complete by the end of your shift at the clothing shop. Each task has an estimated amount of time that it will take to complete. You are working for a total of four hours. Pay close attention to the description of each task. Order these tasks so they can all be accomplished.**

## To Do List:

Task	Time It Will Take
<input type="checkbox"/> Vacuum. This must be done at the end of the shift, just after the store closes.	(45 minutes)
<input type="checkbox"/> Clean mirrors. This must be done just before the vacuuming.	(20 minutes)
<input type="checkbox"/> Record items moved from stock to shelves.	(50 minutes)
<input type="checkbox"/> Wipe down counters with damp cloth. This must be done at the end of the shift.	(15 minutes)
<input type="checkbox"/> Empty dressing rooms and put clothes back on hangers. This must be done throughout the shift, not necessarily for 45 consecutive minutes.	(45 minutes)
<input type="checkbox"/> Water plants.	(10 minutes)
<input type="checkbox"/> Create signs for a big sale.	(45 minutes)
<input type="checkbox"/> Refold clothes on shelves. This must be done throughout the shift and at the end, not necessarily for 45 consecutive minutes.	(45 minutes)

How will I get these tasks completed?