Time Management: Best Practices for Clinical Research

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Boston University School of Medicine
Introduction

**Tinuola** and **Megan** are your facilitators for this workshop
Learning Objectives

1. Identify projects goals & tasks that are of highest and lowest value

2. Develop strategies to align your time and priorities

3. Commit to incorporating time management strategies that will enhance efficiency, effectiveness, & vitality
The Pareto Principle: 80/20 rule

20% of the input (time, resources, effort) accounts for 80% of the output (results, rewards)
Regarding your role as a CRC, which of the following tasks do you spend the most time on?

A. Emails
B. Preparation of study materials (i.e., consent documents, source forms, lab kits)
C. Participant interactions (i.e., screening, consent process, tests/procedures)
D. Regulatory documentation
E. Other
Meet Iris Hemingway

- Clinical Research Coordinator at ABC Hospital
- Clinical Trials Portfolio in the Neurology Department
  - 2 recruiting studies
  - 1 active, not recruiting
  - 2 new studies the PI would like to add to the portfolio
Iris’ Responsibilities Include:

- Ensures study is compliance with law & regulations
- Recruits and screens potential study participants
- Maintains all documents and records related to the study
- Serves as a reference point for study participants
- Manages the inventory of equipment and supplies
- Collects specimens and inputs data and patient information into electronic systems
- Creates reports on each study, including notes on protocols, workload, data collection
- And more...
Competing Tasks...

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https://doi.org/10.1111/j.1752-8062.2012.00423.x
How to Annotate on Zoom

1) Place cursor at top of Zoom Window, select View Option.

2) Choose Annotate.

3) Choose Text.
Annotate
What are the goals of your current research in relation its timeline?

Short-term

Long-term

Click Annotate on your Zoom toolbar and share your thoughts on the question above
Iris’ Short-Term and Long-Term Goals:

**Short-term:**
- Recruit and enroll at least 5 new participants for clinical trial studies by the end of the month
- Complete follow-up visits for 10 participants for the active clinical trial by the end of the month
- Draft the IRB applications for the 2 new studies

**Long-term:**
- Complete recruitment and enrollment for the current 2 recruiting studies over the next year
- Complete all follow-up visits for the active clinical trial over the next two years
- Begin to recruit and enroll for 2 new clinical trial studies

**How do these goals align with how she is spending her time throughout the week?**
Refer to Your Time Tracker:

- What did you learn from tracking your activities?
- Does the way you spend your time reflect your project/research goals?
- Your top 3 takeaways from readings

Time: 8 minutes
As a group, please share your thoughts on the time tracker or break-out room discussion.
## Snapshot of Iris’ Time Tracker:

<table>
<thead>
<tr>
<th>Hours</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 AM</td>
<td>Coffee &amp; Morning Mtg.</td>
<td>Emails</td>
<td>IRB application</td>
</tr>
<tr>
<td>9 AM</td>
<td>Emails</td>
<td>Emails/Waiting for participant</td>
<td>Meeting with IRB about new studies</td>
</tr>
<tr>
<td>10 AM</td>
<td>Participant screening calls</td>
<td>Participant Visit – Consent</td>
<td>Data Entry</td>
</tr>
<tr>
<td>11 AM</td>
<td>Visit reminder calls</td>
<td>Participant Visit – Administer assessments</td>
<td>Emails</td>
</tr>
<tr>
<td>12 PM</td>
<td>Resolving scheduling problem with PET dept.</td>
<td>Participant Visit – Escort to PET Scan</td>
<td>Sponsor Training</td>
</tr>
<tr>
<td>1 PM</td>
<td>Lunch</td>
<td>Delay in PET dose arrival, phone calls to supplier, lunch</td>
<td>Sponsor Training &amp; Lunch</td>
</tr>
<tr>
<td>2 PM</td>
<td>Phone call with sponsor</td>
<td>Participant Visit – Wrap up of visit</td>
<td>Preparing lab kits/documents for visit</td>
</tr>
<tr>
<td>3 PM</td>
<td>IRB application</td>
<td>Data entry</td>
<td>Visit reminder calls</td>
</tr>
<tr>
<td>4 PM</td>
<td>IRB application &amp; chatting with coworker</td>
<td>PI dropped in for discussion</td>
<td>Pulling numbers for PI</td>
</tr>
<tr>
<td>5 PM</td>
<td></td>
<td>Discussion cont.</td>
<td></td>
</tr>
</tbody>
</table>

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Time Management: Best Practices for Clinical Research
Strategically Use Your Limited Time

<table>
<thead>
<tr>
<th></th>
<th>Quadrant 1: Urgent &amp; Important</th>
<th>Quadrant 2: Not Urgent &amp; Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Yield/</td>
<td>Quadrant 2: Not Urgent &amp; Important</td>
<td></td>
</tr>
<tr>
<td>Important</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Yield/</td>
<td>Quadrant 3: Urgent &amp; Not</td>
<td>Quadrant 4: Not Urgent &amp; Not</td>
</tr>
<tr>
<td>Not Important</td>
<td>Important</td>
<td>Important</td>
</tr>
</tbody>
</table>

Adapted from Stephen Covey, *7 Habits of Highly Effective People*

*Boston University School of Medicine*

Time Management: Best Practices for Clinical Research
Complete the quadrants using activities from your time tracker.
In reality, where are we spending our time?

<table>
<thead>
<tr>
<th>High Yield/Important</th>
<th>Urgent</th>
<th>Not Urgent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant arrives an hour late to study visit!</td>
<td>Scheduling</td>
<td>IRB amendments and submissions</td>
</tr>
<tr>
<td></td>
<td>Source Documents</td>
<td>Protocol development</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sponsor Trainings</td>
</tr>
<tr>
<td>Low Yield/Not Important</td>
<td>Emails and more emails</td>
<td>PI requests (non-urgent)</td>
</tr>
<tr>
<td></td>
<td>Organizing binders</td>
<td></td>
</tr>
</tbody>
</table>
Reflection:

• Which quadrants do you spend most of your time in?
• What are strategies for spending more time in the high yield quadrants?
• What are strategies for diminishing time spent in the low yield quadrants?
Adjusting to the New Normal During COVID-19

• Added levels of stress and challenges with the need to feel productive by traditional work standards, as well as adjust to new work distractions

• Distractions shifted or changed
  • New co-workers – pets, kids, roommates
  • Distractions – chores, cooking, cleaning, TV/video games
  • Physical workspace – makeshift desk, cluttered rooms
Full group discussion

• What are common distractions you struggle with?
• Have your distractions changed in the last few months?
• What are the ways you overcome work distractions?
“The bad news is time flies. The good news is you’re the pilot.”

Michael Altshuler
Using Your Time Intentionally

At the beginning of the week:

- **Block out time on your calendar**
- Reflect on how you are aligning your time and priorities
- Review your calendar - 1 week back, 3+ weeks forward
- Review and update your to-do lists
- Identify up to 3 chunks of work that you want to *complete* in the coming week
- Sketch out how you will spend your time in the coming week
  - Establish space, conditions, time of day, environment where you will carry out challenging tasks
  - Use your most productive time each day for highest priority activities to accomplish your goals

Adapted from Susan R. Johnson and National Center on Faculty Development & Diversity
Using Your Time Intentionally

Monday Morning Meeting:

• Spend 30 min. each Monday morning reflecting on how you are aligning your time and priorities
  • Am I planning my week?
  • What adjustments am I going to make moving forward?
  • What can I do to make this adjustment happen?
• Goal is to be clear about decisions you are making with compassion and curiosity – no judgement
  • Observe what is keeping you back and reflect on where you can adjust
Reflect on what’s holding you back from aligning your time with your priorities.

<table>
<thead>
<tr>
<th>Technical Errors</th>
<th>Psychological Blocks</th>
<th>External Realities</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you are missing a relevant skill or a technique (easiest to fix)</td>
<td>Deeper issues that underlie our resistance to spending time on our priority areas</td>
<td>Situations or environmental factors beyond your control</td>
</tr>
<tr>
<td>Examples: Haven’t set aside time to write</td>
<td>Examples: Perfectionism, fear of failure/success, impostor syndrome, unclear goals, disempowerment around writing, etc.</td>
<td>Examples: Moving, birth, illness, death, unexpected caregiving, health problems, COVID-19 pandemic</td>
</tr>
<tr>
<td>Underestimate the amount of time certain tasks take</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lack of planning</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How to Beat the Procrastination Cycle?

To make benefits of actional feel bigger and more real:
- Visualize how great it will be to get it done
- Pre-commit, publicly
- Confront the downside of inaction

To make the costs of action feel smaller:
- Identify the first step
- Tie the first step to a treat
- Remove the hidden blockage

https://hbr.org/2016/07/how-to-beat-procrastination
Tips to Effectively Use Your Time

• Create a time audit (i.e., time tracker)
• Creating a time limit (i.e., alarms)
• Use a to-do-list
• Plan ahead
• Spend your mornings doing MITs (most important tasks)
• Do not multitask! Focus on one activity at a time
• Give yourself a break and recognize your limits
• Buffer time before meetings
• Learn to delegate

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https://www.forbes.com/sites/johnrampton/2018/05/01/manipulate-time-with-these-powerful-20-time-management-tips/#79b9067c57ab
The Art of Delegation

1. Tiny
2. Tedious
3. Time-Consuming
4. Teachable
5. Terrible At
6. Time Sensitive

https://hbr.org/2017/07/how-to-decide-which-tasks-to-delegate
Using Your Time Efficiently

• What are examples of activities that you can “cut corners” on without impairing your effectiveness?

• Consider the following:
  • What is the opportunity cost of perfectionism?
  • In what areas are you competent enough to cut corners?
  • Refer to your quadrant & goals:
    • High yield → more attention/time
    • Low yield → less attention/time
How can you effectively use your time wisely using the tips mentioned above?
Computer-Based Applications:

• Examples:
  • Trello
  • Microsoft Planner
  • Asana

• Advantages: Keep organized, collaborate with others on lists, set-up notifications

• Disadvantages: Learning curve on using applications, time-consuming to create, not as easily accessible
Complete Data Entry for Subject XXX

Description

Add a more detailed description...

Activity

Write a comment...

ADD TO CARD
- Members
- Labels
- Checklist
- Due Date
- Attachment
- Cover

POWER-UPS

Add Power-Ups
Get unlimited Power-Ups, plus much more.

Upgrade Team

ACTIONS
- Move
- Copy
Managing up- Strategies to communicate with PI/supervisor

• My PI is VERY busy
• Preparation is key
• Set an agenda
• Everything in writing
• Call in an ally
• Follow through
Important Elements of Managing Up

• Be empathetic to your boss’s goals, pressures, strengths, weaknesses, blind spots, preferred work style
• Develop clear expectations & agree on priorities
• Be honest & reliable
• Understand yourself
• Be direct in private and on the same page in public
• How can you make your PI look good?

Adapted from Managing Up slide deck- Jessica Fetterman, PhD (Boston University School of Medicine)
Make time for fun and networking!

• Self-compassion
• Stress management
• Team building and activities
Key Takeaways

- Have a regular practice of reviewing how you are spending your time and how it aligns with your goals
- Establish short, intermediate, and long-term goals, and block off time for all 3 activities
- Identify the environment/conditions that work best for you
- Be intentional about how you spend your time
- Incorporate strategies that enable you to take care of yourself and meet your goals
Make a Commitment to Yourself

• In what specific ways will you change your daily routine to achieve your goals and enhance your vitality?
• What are you already doing that you want to do more of?
• What behaviors do you want to change?
Thank you

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