

Time Management: Best Practices for Clinical Research

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Introduction

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



Tinuola

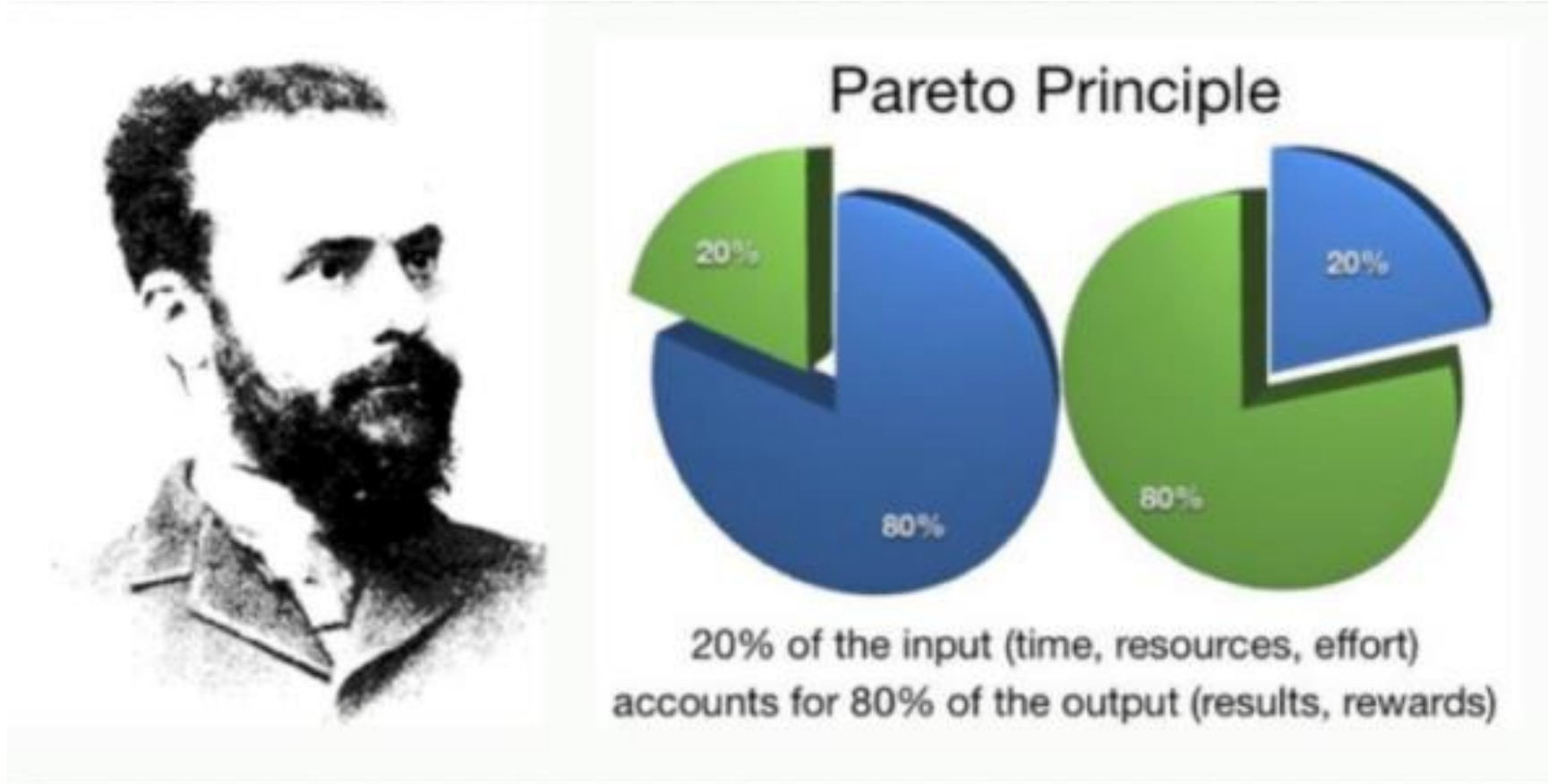


Megan

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



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

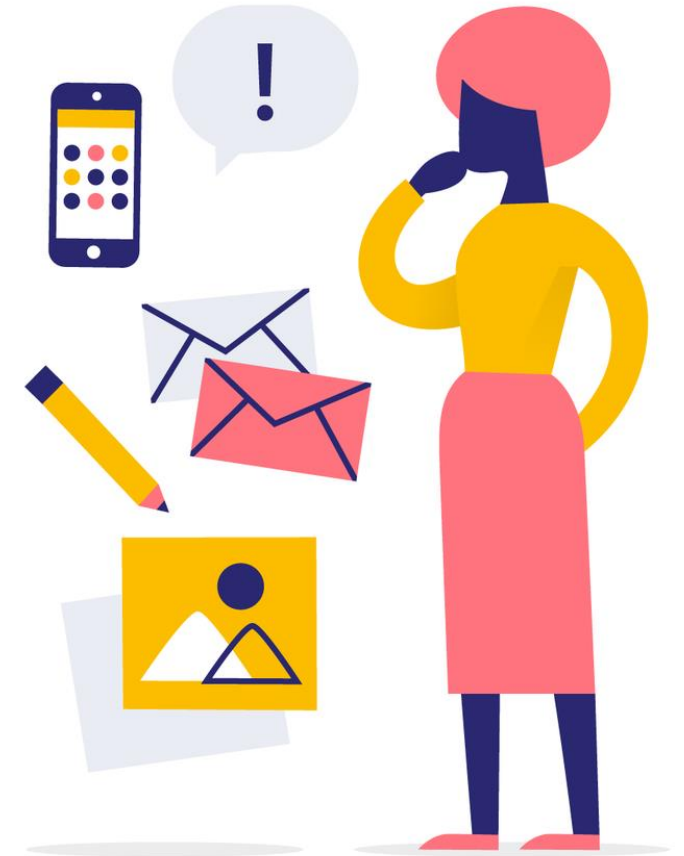
Meet Iris Hemingway



- 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:

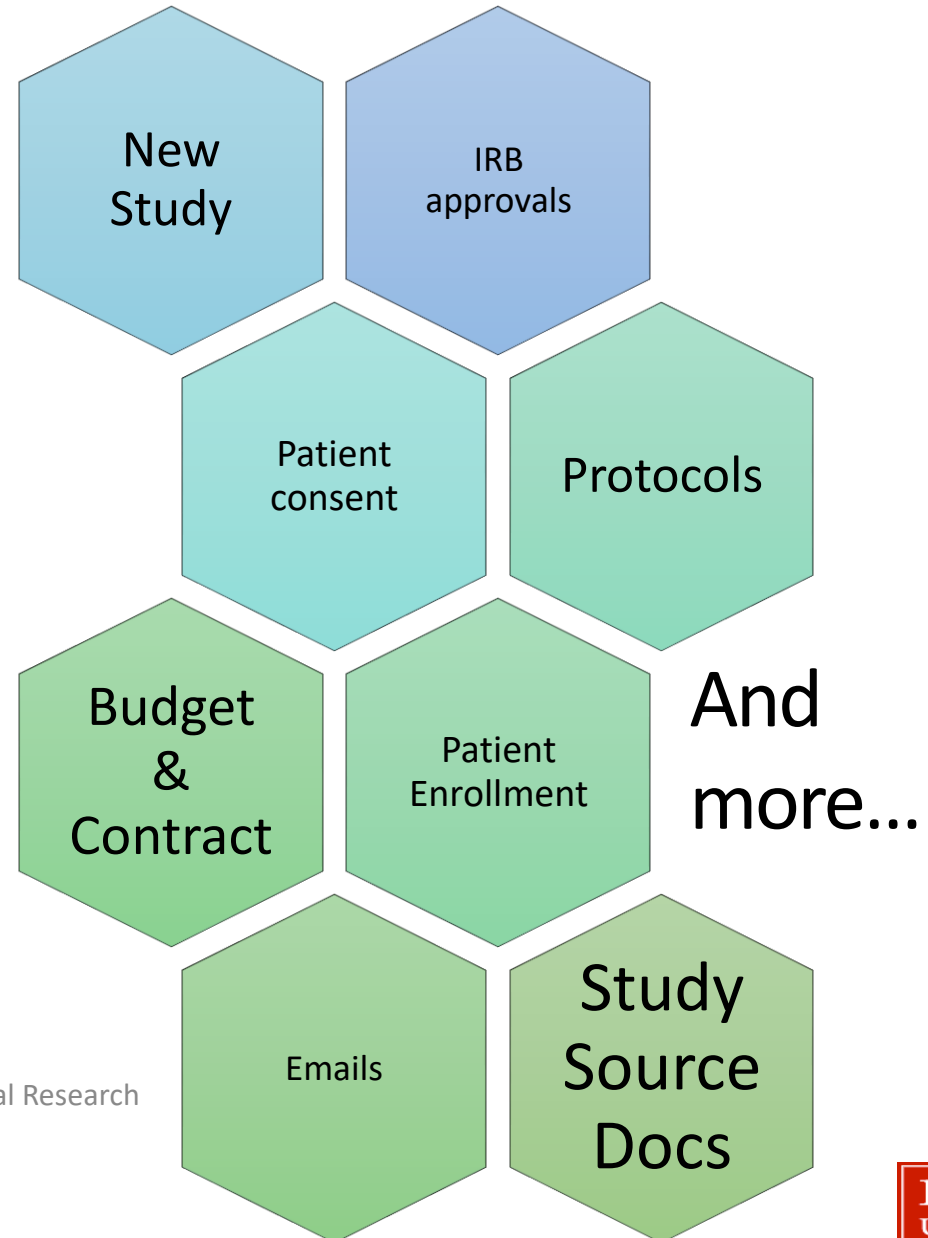
- Ensures study is compliance with law & regulations
- Recruits and screens potential study participants
- Maintains all documents and records related to the study
- Serves as a reference point for study participants
- Manages the inventory of equipment and supplies
- Collects specimens and inputs data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



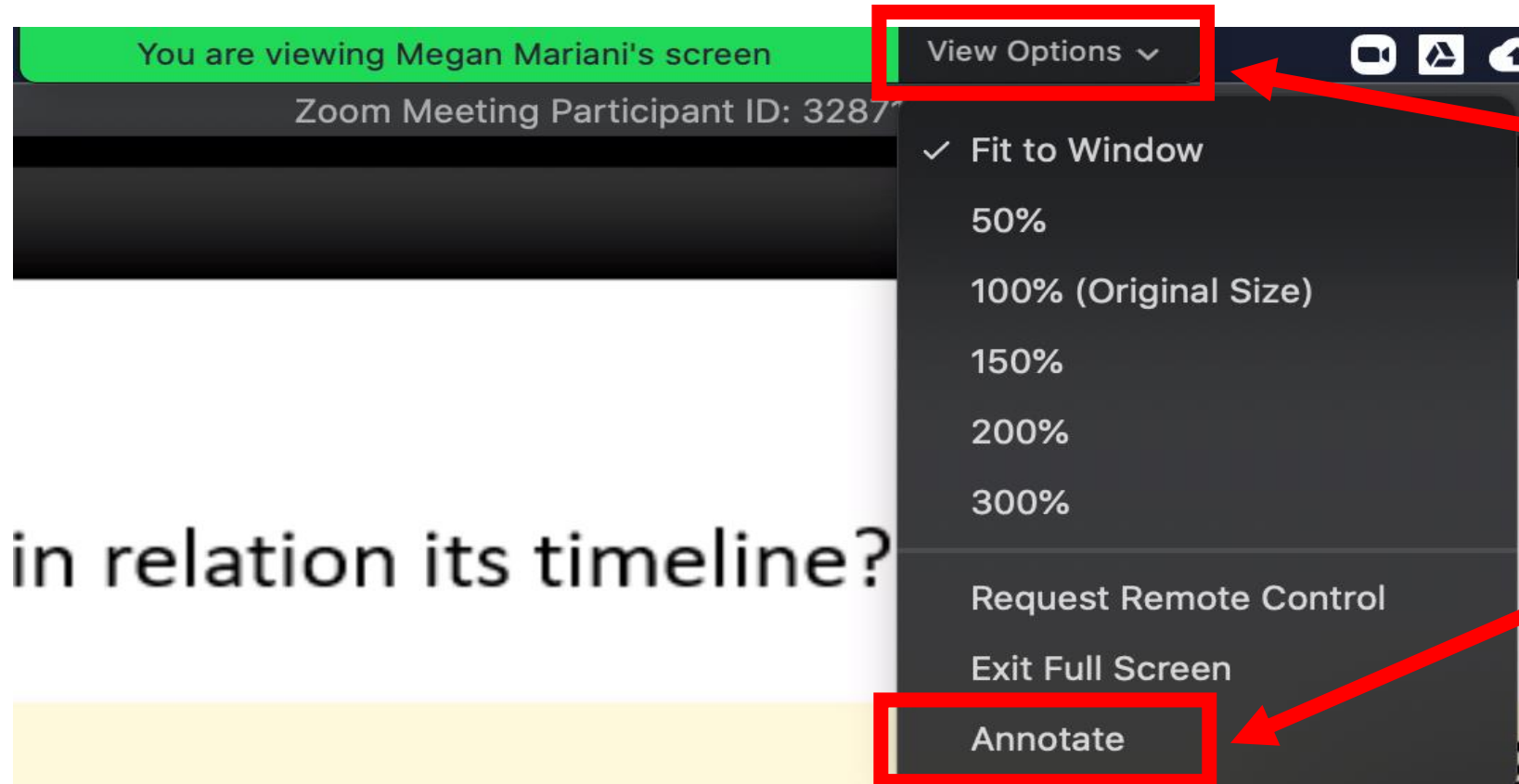
Competing Tasks...



Time Management: Best Practices for Clinical Research



How to Annotate on Zoom



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

2) Choose **Annotate**.

3) Choose **Text**

Annotate

**Time: 5
minutes**

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

Breakout Room



As a group, please
share your thoughts
on the time tracker or
break-out room
discussion.



Unmute



Snapshot of Iris' Time Tracker:

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

Strategically Use Your Limited Time

High Yield/ Important	Quadrant 1: Urgent & Important	Quadrant 2: Not Urgent & Important
	Quadrant 3: Urgent & Not Important	Quadrant 4: Not Urgent & Not Important
Urgent		Not Urgent



High Yield/ Important

Low Yield/ Not Important

Urgent

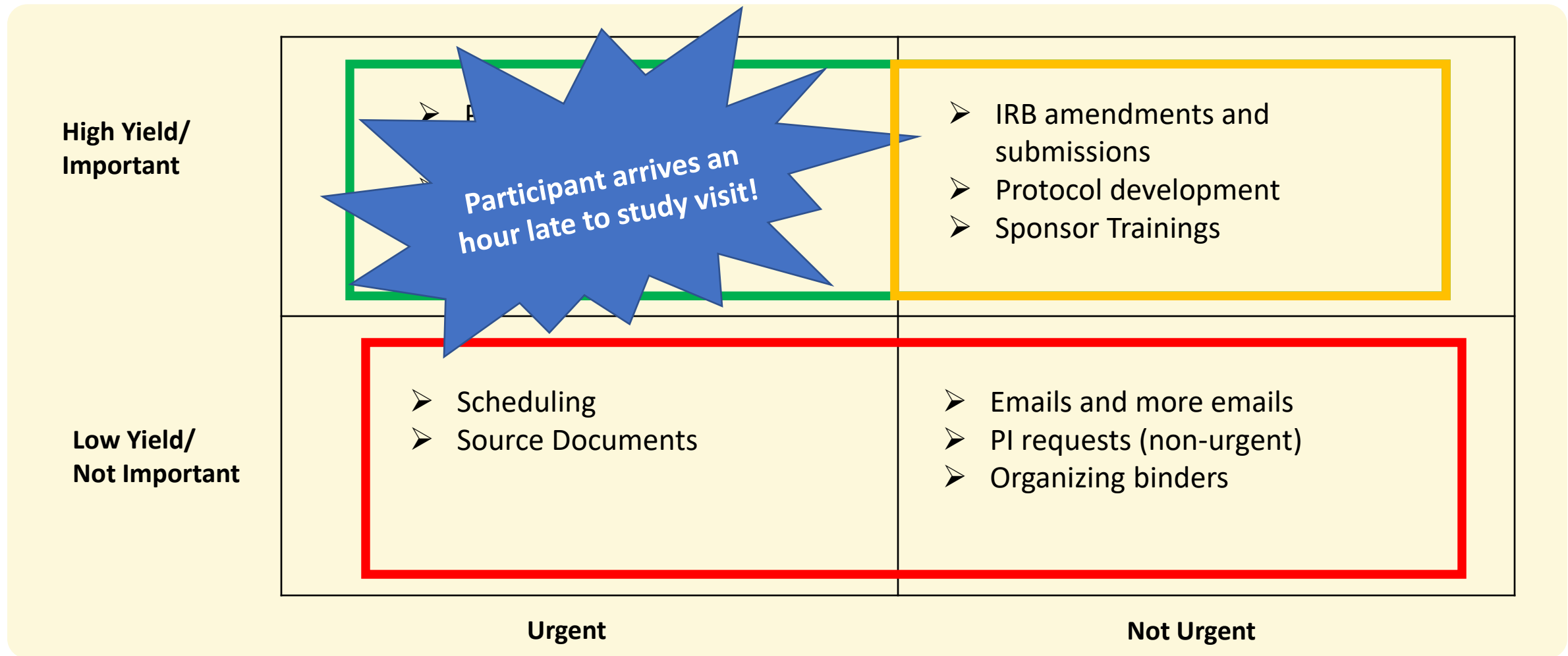
Not Urgent

Time: 5

minutes



In reality, where are we spending our time?



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?



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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?



Unmute



**“The bad news is time flies.
The good news is you’re the pilot.”**

Michael Altshuler



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Using Your Time Intentionally

At the beginning of the week:

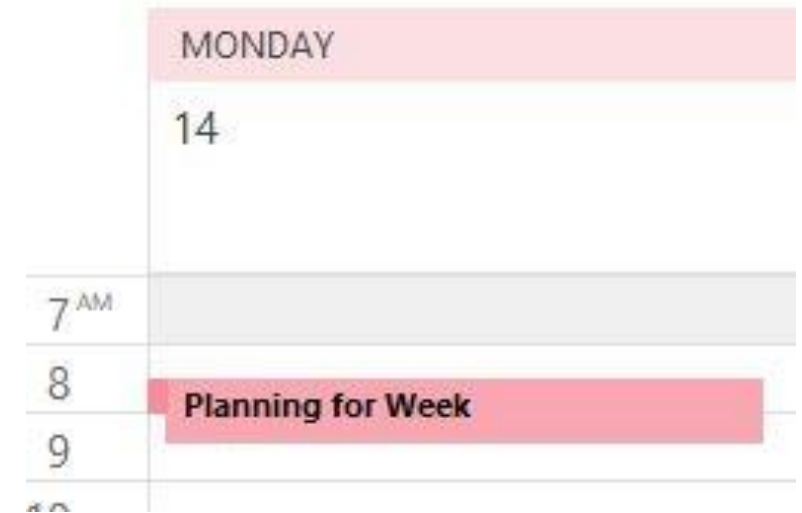
- **Block out time on your calendar**
- Reflect on how you are aligning your time and priorities
- Review your calendar - 1 week back, 3+ weeks forward
- Review and update your to-do lists
- Identify up to 3 chunks of work that you want to *complete* in the coming week
- Sketch out how you will spend 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



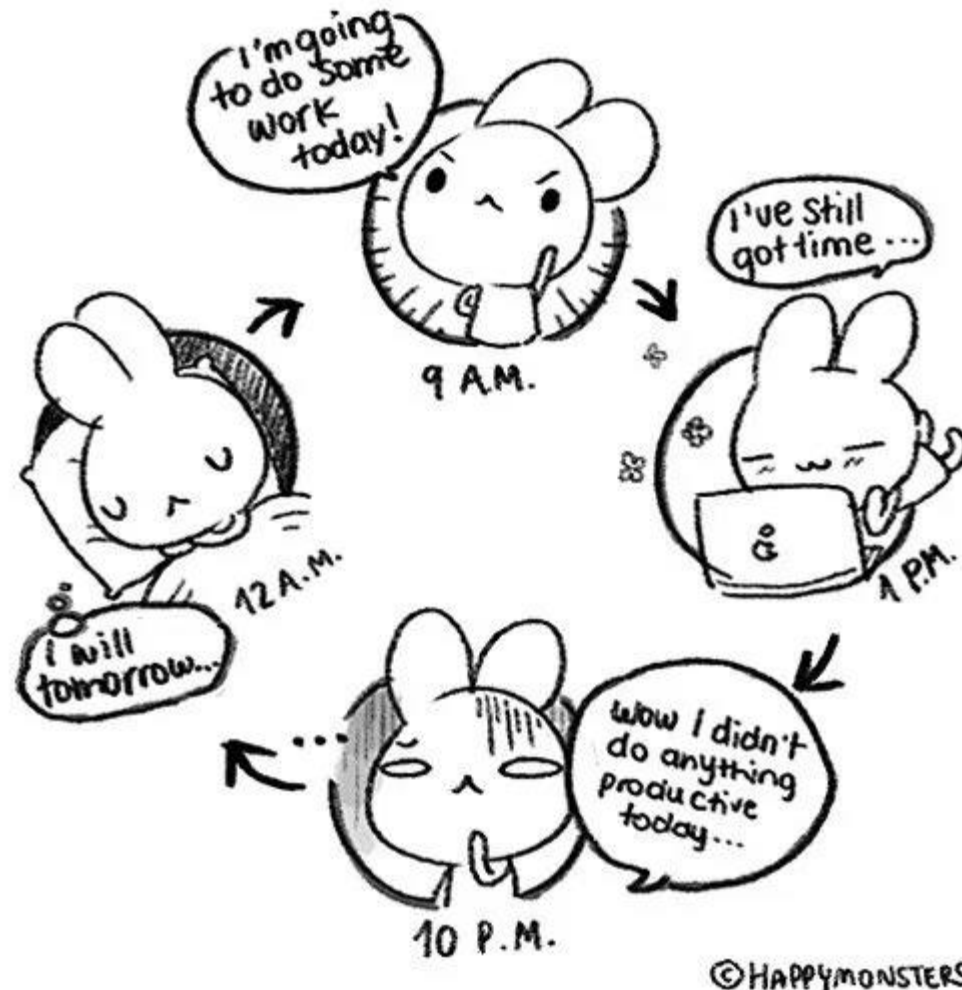
National Center on Faculty Development & Diversity

Reflect on what's holding you back from aligning your time with your priorities.

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

National Center on Faculty Development & Diversity

the procrastination cycle



How to Beat the Procrastination Cycle?

To make benefits of action 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



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

The Art of Delegation

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



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

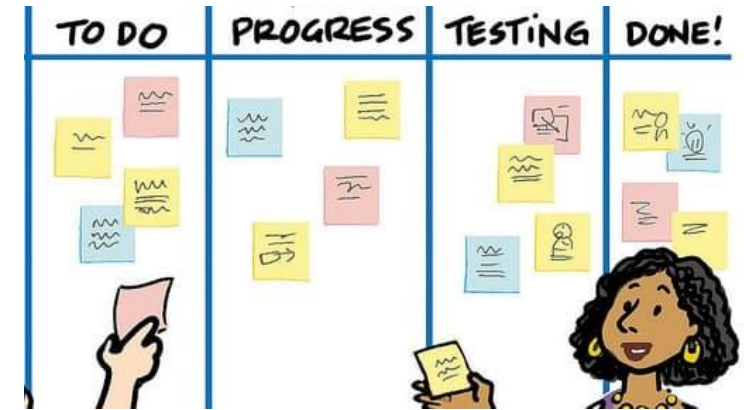
How can you effectively use your
time wisely using the tips
mentioned above?



Unmute

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



Clinical Trial WBS template

Personal

Public

CH

CH

C

+7

Show Menu

Initiating

Services agreement

Identify funding source

Finalize budget and scope

Develop more detailed budget based off delegation of ops response

Review protocol/synopsis & org round table with navigator, manager & director

Assign navigator & CTOM

IIT preliminary budget

Planning

secure drug/device from manufacturer

meet with data core

PM plan

establish source plan

establish all essential committees

database design

send out contracts

select clRB

Executing

Complete Pharmacy manual

Oct 22, 2018 1

Contracts fully executed

sign off on case report forms

create lab manual

IND/IDE submission to FDA

complete billing grid (if local site is used)

finalize protocol with stakeholders

Monitoring & Controlling

maintain training

SAE/AE reports to DSMB chair/committee

Positive reinforcement with sites

establish timing of monthly webinars

Set up recurring calls with coordinators

send out monitoring letters

Send out newsletter

Closing

Close out clRB

Close out IND/IDE

Close out clinicaltrials.gov

ensure data archived

ongoing oversight

closeout of finances & contracts

Close out visit

Ensure return of study equipment

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Complete Data Entry for Subject XXX

in list [1018 5/4-5/5](#)

Description

Add a more detailed description...

Save

×

Activity

MM

Write a comment...

Formatting help

Show Details

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

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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

Have a
great week
ahead!

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