



## THE PROFESSIONAL SYSTEM



*How to get the best out of your*  
**Filofax Professional System**

## **time for business... ...time for leisure**

To value 'time' as your most precious commodity should be an essential element in your philosophy of life. We trust that you will have years of benefit and enjoyable use from your Filofax Professional System.

### **What is the Filofax Professional System...**

Whether at work or at leisure, our planning systems do more than just organise your appointments.

The Professional System looks a lot like a Filofax personal organiser, sharing common features such as a binder, diary, tabs etc. However, the Professional System has been designed to help you control your work by giving you a complete overview of your **important and urgent work** at a glance. This unique planning system helps you to:

- Establish and prioritise goals
- Schedule tasks, delegate and plan the day
- Put plans into action
- Manage and track projects
- Run time focused meetings
- Control monthly expenditure
- Have a balanced life

Time is a precious commodity to all of us and the sensible and organised use of it is key to all business and personal management. The opportunity of becoming a much more effective 'time manager', reaping the benefits at work and in life generally, is now at your fingertips.

### **the Filofax Professional System - a dynamic tool for smarter working...**

# How to assemble and use your Filofax Professional System

On the following pages this guide explains each of the 'tabbed' sections and forms in detail and helps you put the planning forms and general stationery into the relevant places. The way in which you eventually organise your system will probably be very specific to your own requirements. Initially however, we suggest that you start with our recommended format.

**The filled binder** is pre-installed with your essential undated stationery and a set of PVC subject, numbered and alphabetical tabs.

If you have opted for the **Classic Week to View Diary**, you will also find this on the ring mechanism. Alternatively, if you have purchased the **Classic Two Pages per Day Diary**, this has been designed to fit a maximum of 2 months diary pages on your ring mechanism at any one time. Therefore, you will find a separate pack containing your **Classic Two Pages per Day Diary** with additional dated forms. The month overviews may be used for forward appointments.

## Getting Started

Place your binder in front of you, open the rings. Take the plastic wrapper off your diary and dated set (Classic Two Pages per Day Diary only), keeping the pages in their current order.

*To open the ring mechanism, push down on the top and bottom small levers, to spring open the rings.  
To close, just snap the six rings back into the closed position.*



Visualise your plans at all three levels - long, medium and short term by folding out your yearly and monthly plans.



There is no need to open and close the ring mechanism to move the page finder each day; simply open your binder and snap the page finder onto the rings at today's page.



Filofax Time Management  
Unit 3, Victoria Gardens  
Burgess Hill, West Sussex RH15 9NB  
Tel: 01444 238100 Fax: 01444 238119  
E-mail: [timemans@filofax.co.uk](mailto:timemans@filofax.co.uk)  
[www.timemanagement.co.uk](http://www.timemanagement.co.uk)

This is the front page of your system, the information related section.

FRONT

## Place these forms behind the Front Cover

- Personal Information Sheet
- Data Pack

## Personal Information Sheet

- Store useful personal information for quick reference.

Personal Information	
Company	
Company Name:	
Position:	
Address:	
	Postcode:
Telephone:	Mobile:
Fax:	E-mail:
Web Site:	
Personal	
Name:	
Home Address:	
	Postcode:
Telephone:	Mobile:
Fax:	E-mail:
National Insurance Number:	
Car Registration:	
Insurance Company:	
Insurance Company Telephone Number:	
Recovery Service:	

*Remove used planning forms regularly and file them if appropriate.*





## Data Pack

Situated at the front of your diary the data pack contains the following practical information forms:

- 3 Year calendar
- UK road distance chart
- Travel information
- International holidays/information
- Conversion tables

FRONT

2xxx

**JANUARY**

WK	M	T	W	T	F	S	S
1	1	2	3	4	5	6	7
2	7	8	9	10	11	12	13
3	14	15	16	17	18	19	20
4	21	22	23	24	25	26	27
5	28	29	30	31			

**FEBRUARY**

WK	M	T	W	T	F	S	S
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31				

**MARCH**

WK	M	T	W	T	F	S	S
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31				

**APRIL**

WK	M	T	W	T	F	S	S
1	1	2	3	4	5	6	7
2	8	9	10	11	12	13	14
3	15	16	17	18	19	20	21
4	22	23	24	25	26	27	28
5	29	30	31				

U.K. Road Distance Cl

WK	M	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		

Travel Information

City	Weather	Car Travel/Motoring Information	Domestic Airlines
Aberdeen	Weather check* 09001 333111	AA Blackwatch and Weatherwatch* 09003 40100	British Airways 0845 7
Aberystwyth	(UK and world-wide) 09001 333111	*Calls charged at up to 60p per minute	British Midland 0870 6
Birmingham			easyjet 0870 6
Bristol			
Cardiff			
Derby			
Dover			
Edinburgh			
Exeter			

International Information

Country	GMT	International Direct Dialling Area	Country	National Holidays 2xxx
① Australia	+8 to +10	00 11	61	Jun 1,27; Apr 18,21,25; Dec 25,26.
② Austria	+1	00	43	Jun 1,6; Apr 21; May 1,29; Jun 9,19; Aug 15; Oct 26; Nov 1; Dec
③ Belgium				
④ Brazil				
⑤ Canada				
⑥ Chile				
⑦ Denmark				
⑧ Finland				
⑨ France				
⑩ Germany				
⑪ Greece				
⑫ India				
⑬ Ireland				
⑭ Italy				
⑮ Japan				

Conversion Tables

Ready Reckoner

**Temperature**

°F	32	40	50	60	70	75	85	95	105	140	175	212
°C	0	5	10	15	20	25	30	35	40	60	80	100

**Speeds**

mph	20	30	40	50	60	70	80	90	100
km/h	32	48	64	80	96	112	128	144	160

**Tyre Pressures**

lb/sq in	20	22	24	26	28	30	32	34
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**Registration Sheet:**  
Fill this out and mail to us. Once on our mailing list, if requested, you will receive regular updates and information from Filofax.



PLAN

This section is used to help you co-ordinate medium and long term plans. The planning forms provided allow you to track projects, appointments and commitments by the month and year (up to a year in advance).

Place the following forms behind the PLAN tab.

- Year plans current and following year
- Project overview/plans current and following year
- Dated monthly plans (not the current month)

Year Plan 2xxx

January

W 1  
Bank Holiday (AU)  
T 2  
Bank Holiday (Australia)  
F 3  
S 4  
S 5  
M 6  
T 7  
W 8  
T 9  
F 10  
S 11  
S 12

Project Plan 2xxx

Month Overview

January 2xxx

	8	9	10	11	12	13
W 1	Bank Holiday, UK 1					
T 2	Bank Holiday (Australia)					
F 3						
S 4						
S 5						
M 6	Epiphany 2					
T 7						
W 8						
T 9						
F 10						
S 11						
S 12						

Dated Year Plan

This form should be used to block out activities, which require a whole day or more.

- Plan for an entire year on this fold out calendar
- Organise work around committed time e.g. holidays, business trips etc.
- Keep track of staff holidays - important for project planning and delegation

Year Plan 2xxx

January	February	March	April
W 1 Bank Holiday (AU) T 2 Bank Holiday (Australia) F 3 S 4 S 5 M 6 T 7 W 8 T 9 F 10 S 11 S 12	S 1 S 2 M 3 T 4 W 5 T 6 F 7 S 8 S 9 M 10 T 11 W 12	S 1 S 2 M 3 T 4 W 5 T 6 F 7 S 8 S 9 M 10 T 11 W 12	T 1 W 2 T 3 F 4 S 5 S 6 M 7 T 8 W 9 T 10 F 11 S 12

PLAN

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Designed to give you a broad overview of your workload.

- Plan and organise your yearly projects with this useful Gantt chart (Folds out to 3 x A5 widths)
- Plot each element of your project using the week numbers along the top of the form as a guide

[illegible]

Please refer to page 9 for more detailed information on the monthly plans.

Use the monthly plans in this section to:

- Schedule activities requiring less than a whole day straight onto the monthly plans
- Move the relevant monthly plan to the front of your diary section at the start of each new month

Month Overview				January 2xxx			
		8	9	10	11	12	13
W 1	Bank Holiday, UK 1						
T 2	Bank Holiday (Scotland)						
F 3							
S 4							
S 5							
M 6	Euphorias 2						
T 7							
W 8							
T 9							
F 10							
S 11							
S 12							
M 13	3						
T 14							
W 15							



## DIARY

**Place the following forms behind the DIARY tab.**

- **A maximum of 2 months Classic Two Pages per Day diary pages OR your Classic Weekly diary pages**
- **The current Monthly Overview/Plan** - position at the beginning of the day/week plan section in front of the first day/week diary page

The weekly diary pages help you to plan your tasks a week at a time.

- List and prioritise the main tasks of the week
- Make contact, delegation and personal reminders
- Use additional space for expenses and to record notes/action points

[illegible]

*List all the tasks that you can realistically accomplish that week and prioritise them.*



# DIARY

- List and prioritise the main tasks of the day
- Use the time schedule to balance those tasks alongside the appointments to which you are already committed
- In column '**A**', block out chunks of priority time on your appointment schedule with a vertical arrow or bar
- Make contact, delegation and personal reminders
- Use additional space to record expenses and notes/action points



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## NOTES

**Place the following forms behind the NOTES tab.**

- ## Notes Paper

Practical notepaper for a variety of business needs.

- Use the slim column to the left to make sub-headings with fuller notes to the right

Notes

*If you need to access information in your system that is normally kept on your PC, use some of the plain paper in the notes section to make printouts. These working documents should then be placed behind the relevant tab in your binder.*



Ideal for planning or attending meetings, these specially designed forms not only save you time but also encourage the practice of effective and organised meetings.

- Use for preparation and reference before, during and after a meeting
- Set objectives, prepare an agenda and record major decisions for action

subject		Ref.
Thaired by Date		
Start	Finish	
Venue Telephone No.		
Present		
Main Objectives		Achieved
Other Objectives		Achieved
agenda		Estimated Time

*Meetings - putting on  
your Time Management hat, you should  
constantly ask yourself four fundamental questions:*

- 1. Is this meeting really necessary?*
- 2. If so, looking at the agenda, how much of my time is the  
subject really worth?*
- 3. Will the meeting start promptly and end on time?*
- 4. What preparation do I need to do in order to  
contribute constructively?*

*Keep the objectives of meetings clearly  
in mind.*



## FILE

The file section is your Key Area Sub-division and this component is designed to capture and manage dynamic information relating to key areas of your work under the sub-dividers 1-7. A key area is a sub-section of your overall job for which you are responsible. You need to focus your time and resources on these areas if you are to achieve your objectives. Acting as the heart of your system, it also provides specific key areas for your personal life outside your work - such as family, personal interests, ideas etc.

**Place the following forms behind the FILE tab, under the relevant sub-dividers (1-7, IDEAS or PERSONAL) as detailed:**

### **Performance Areas**

Position your Performance Areas sheet on top of the tab numbered 1.

### **Results Planners**

Behind each key area tab numbered 1-7.

### **Project and Mind Planners**

Behind each key area tab numbered 1-7.

### **13 Column Planning Matrices**

Behind the IDEAS tab.

### **'To Do' Lists**

Behind the PERSONAL tab.

### **Blank Paper**

Behind the IDEAS tab.





IDEAS

PERSONAL

## Performance Areas

A good indication of your key areas is your job description. Think about the different aspects of your work and the roles that you have to manage. The possible entries for this sheet are endless and depend completely on your job role.

Example of Key areas:

### **Marketing:**

Market Information, Marketing Plan, Products, Campaigns, Packaging, Pricing and Communications.

### **Purchasing:**

Product range, Suppliers, Planning, Quotes, Stock Control, Purchasing Costs.

- List your key areas on the **Performance Areas Sheet** provided. We recommend that you combine functions if necessary to keep your total number of roles to seven or less. In each of these key areas you will need to define or set objectives

	Performance Areas
1	
2	
3	
4	
5	
6	

*We recommend that you use a pencil when writing in your system as it can be easily changed. A highlighter can be used to block fixed times and holidays which have been confirmed.*



The results planner has a fold out page enabling you to view your entire project at a glance.

- Brainstorm and establish the parameters of the project
- Confirm what it is you want to achieve
- Agree your success criteria
- Schedule activities, dates and budgets
- Enter a priority rating
- Delegate and review at regular and agreed dates
- Analyse project progress, effectiveness and results

[illegible]

**Specific** - Quantified and clear, not vague

### Measurable - How will you do this?

**Agreed** - Better to involve than impose

**Realistic** - Achievable but stretching

**Timed** - With a time frame and deadline

**Evaluated** - Check progress against the plan

**Reviewed** - What can we learn?

*You will never achieve an objective if you do not break it down into manageable steps. Each day/week you should be nearer to your desired result.*



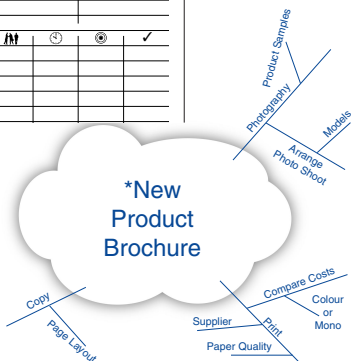
## Project and Mind Planners

Enables you to plan, implement and control each project whilst tracking your progress.

- Identify your main objectives with start and finish times
- List tasks, identify resources, control progress to ensure project is completed on time
- Use as a summary sheet for all current delegated tasks
- Evaluate costs
- Use the Mind Planner to illustrate thoughts or ideas on your project
- Start with your subject inside the cloud, then let your mind run freely outside the cloud to brainstorm the project (see example below\*)

Project Planner					
Project Title			Ref:		
Start Date			Completion Date		
Objective					
Team		Budget	Actual		
Task		Resources	Time	Cost	Check

Key Notes



Delegate more but brief clearly.

Be prepared to say 'NO' to tasks which will prevent you from achieving your objectives.



### 13 Column Planning Matrix

An A4 folded horizontal spreadsheet with 13 columns across. Matrices are extremely flexible multi-purpose forms.

- Use these matrices to chart, for example, sales results by product groups, help with initial planning and much more

[illegible]

## 'To Do' Lists

Interruptions can spell disaster for a well-planned day by distracting us from the task in hand.

- Store interruptions for action later
- Control the clutter, keeping things away from your daily/weekly plans until needed
- Use one 'To Do' form for work and one for home

[illegible]

## Blank Paper

- Invaluable for sketches, jotting down thoughts and ideas or to use as printer paper

*Go through your 'To Do' lists regularly. If a 'To Do' task is becoming urgent - transfer to a daily plan.*



## EXPENSES

**Place these forms behind the EXPENSES tab.**

## Receipts Envelope

- Store all business and personal receipts in a single safe envelope
- Record the date, amount and description of purchase

[illegible]



## DIRECTORY

Your alphabetical telephone/address book enables you to find names, numbers, addresses and e-mail addresses quickly.

**Place these forms behind the DIRECTORY tab.**

Under the A-Z index provided.

- **Contact Directory Sheets**

### Contact Directory Sheets

For personal and business contact names, addresses, e-mail, telephone and fax.

ame	Phone
ddress	
	Fax
-mail	Mobile
ame	Phone
ddress	
	Fax
-mail	Mobile
ame	Phone
ddress	
	Fax
-mail	Mobile
ame	Phone
ddress	
	Fax
-mail	Mobile
ame	Phone
ddress	

*If you have telephone/address data in your computer, you can make print outs and transfer to the A-Z directory.*



**The end result of being a better time manager is that you are able to spend your energies, talents and time on the things that matter to you.**

Every form listed in the Filofax Professional System is available as a separate pack. Consult your Filofax Time Management brochure for product information, stock numbers and prices.

**To order a brochure:-**

**Phone: 0870 550 2230**

**Fax: 0870 550 2231**

**E-Mail: [timeman@filofax.co.uk](mailto:timeman@filofax.co.uk)**

Our customer service team have full knowledge of our products and are there to help you with your requirements.

For Corporate clients requiring information, please ask for our Business Development Manager who will be able to advise on the introduction of our planning systems into companies of all sizes.

**Phone: 01444 238100**

**Fax: 01444 238119**

**E-Mail: [timeman@filofax.co.uk](mailto:timeman@filofax.co.uk)**

Unit 3, Victoria Gardens,  
Burgess Hill, West Sussex RH15 9NB  
Telephone: 01444 238100 • Fax: 01444 238119

**[www.timemanagement.co.uk](http://www.timemanagement.co.uk)**

## **Time Skills Open Course**

Invest in this one day seminar which teaches you not only enduring principles of good time management but also skills to help you focus each day on the personal and professional goals that mean the most to you.

**For full details, including course content, location, dates and costs please contact our Training Team on 01444 238160.**

## **In-Company Training**

Filofax training has gained a trusted reputation for providing pragmatic results orientated training programmes. We understand that training is about delivering a measurable performance improvement and a tangible return on investment. Therefore the emphasis on our portfolio of eight 'personal effectiveness' programmes is on results driven, measurable training with Filofax trainers presenting useful theory, profound insight and entertaining delivery.

- Comprehensive Time Management
- Managing Pressure for Peak Performance
- Planning and Managing Projects
- Assertive Communication Skills
- Effective Presentation Skills
- Creativity and Innovation
- Mind Skills
- More Time for Sales

**To receive the latest copy of our Training Portfolio, please contact our Training Team on 01444 238160.**

***FILOFAX***<sup>®</sup>  
time management

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[www.timemanagement.co.uk](http://www.timemanagement.co.uk)