How a Change in My Role Inspired Six Impactful Habits

Have you ever looked back at a moment or event in your life and realized that it was an impactful turning point? I just recently had that experience.

A couple of months ago, a change to my main role at Buffer prompted me to re-evaluate how I organize myself and plan my day. The results? They've been impactful.

I'd love to share a bit of context.

I'm a Customer Advocate working in the support team at Buffer. For the most part, my approach to work has always been quite passive. I was able to succeed in my role by consuming information and reacting to questions brought to me. I didn't push a lot of information outward.

Most of my time is spent working directly with our customers or contributing to projects that would impact the customer experience. Most of my meetings (we call them 'syncs') were with other members of the Customer Advocacy team.

Then, in January 2022, I had the exciting opportunity to jump into a new function as a liaison between the Customer Advocacy team and our Engineering, Product, and Design (EPD) teams. Some of my responsibilities would include making sure our support team is fully informed about what features we're building, passing along customer feedback and insights to EPD, and helping to plan new feature launches.

I was all-in, but I also had a lot to learn about how EPD works, how marketing launches flow, and more. Things move fast, and the relevant information that I need to be effective in this role can pop up in any one of a number of our communications apps. There's no way I could do all this

without being much more organized than I was before.

I had no choice but to shake up how I work. I could no longer function in the uncertainty or anxiety that I might have forgotten something important that I was supposed to do. And, while I do love the fresh start that a new notebook and pen provides, this effort required more of me than just a new stationery purchase.

Over the last several months, I found that a combination of six mindset tweaks and new habits have helped me keep up with my commitments and reduce uncertainty.

**Disclaimer: While all of these habits have worked nicely for me, it could be the case that you'll want to tweak them or completely ignore them based on your own preferences and work style.*

1. I have a morning routine to plan my day.

Working from home can quite easily mean that not much happens between the bed and the laptop. That's never felt great to me, and even before we got a dog, I would leave the house for a walk to get a coffee or for a run or a gym session. I needed to feel like I was doing *something* before 'going to work'. Now we have Diego, his morning walk is part of a routine that really helps me start my day right.

When I sit down to work, I have my list of tasks, which I have set up in a board view in Asana (the tool I use for planning my work). The columns I work with are **Today**, **Tomorrow**, and **Later**. This helps me keep today's priorities in focus.

Then, I have a checklist of all the places I review every day: email, Slack, Threads, and a bunch of bookmarked internal documents so that I don't miss a thing.

I check my calendar and make sure I'm ready for any meetings and syncs that day. For bigger meetings, such as a performance review, I'm sure to have a reminder set days or even weeks in advance in Asana.

All of these practices give me a clear idea of what today will look like. Once I know what to expect, I'm ready to dive in.

2. I use notification management to keep informed.

To make sure I don’t miss any important conversations I should be aware of, I set up notifications to let me know when someone makes a change to a specific document, when someone comments in certain Slack channels, and when new updates are shared in key Threads forums.

While checking individual apps for their notifications is a great flow for some people, I’ve found that sending all app notifications to my email inbox is the most thorough process for me to follow because everything is in one place. I hold myself accountable to this by having a daily goal to clear out my inbox.

3. I take time to prioritize.

Prioritization hasn’t always come naturally to me. There are often tasks with a similar level of urgency, and picking and choosing which feels more important/urgent isn’t always easy. There can be feelings of guilt for not doing something that you’d planned or committed to, and that cognitive friction just adds to the challenge.

I’ve found that the best way to really honor prioritization is to consider the impact of not doing that work. Would it matter?

If honoring the true prioritization means that I have to delay another commitment, I’ve learned that the best way forward is to communicate to the other stakeholders as quickly as possible, to ask for help, or to delegate.

4. I break bigger projects down.

Some projects, such as launching a new feature, can be divided into subtasks and milestones. When doing this, it's usually quite clear which order things need to be done in, and I'll add a due date for each task/milestone.

If other people are involved, I'll be clear with them about the timing I have in mind. The beauty of this is that if some unexpected time becomes available, perhaps if a meeting gets canceled, I know I can make progress with a sub-task rather than feeling like I need to wait until I have a whole day clear before I can get started.

5. I'm more disciplined.

It's ok to say no, delegate, or ask for more time. It can feel good to say "yes" to requests for help, especially if it's a task I think I'll enjoy. I've learned that, unfortunately, the pleasure of getting involved in something new can sometimes become outweighed by the dreadful feeling of an uncompleted task getting pushed down the list. I've learned that saying "no" or "Is it ok if I get to that next week?" can sometimes be the best gift I can give to the other person. I also like to think through who else might be a better option as the owner of this. Perhaps we can chat with them about taking it on or sharing the work.

Tackle quick jobs on the spot and add bigger jobs to the to-do list. Some tasks that crop up can be done then and there, even if they're not high priority. If something takes 5-10 minutes, I like to tackle it. However, I like to be alert and use discernment! It's important to ensure that many small tasks don't derail bigger plans for the day.

Strip the to-do list! I've found that it's important to revisit my to-do list– especially if it seems ever-growing –

and delete things from it. It feels great! The question ‘what would happen if I didn’t do this?’ normally helps bring clarity to the decision of deleting something. Once finished, I inform anyone else involved in that work.

Get started even when motivation is low. Big projects, tasks that don’t feel exciting, and low-priority projects that have been put off can end up as standards on a to-do list. I like to approach these projects by dedicating just 10 minutes. Sometimes this small bit of momentum allows the rest to fall into place.

6. I recognize the feeling of overwhelm and act on it.

I want to prioritize myself by taking time for periodic mental health check-ins. Am I fed, hydrated, and rested? Would a 5-minute break help? It’s so tempting to push stubbornly against a brain that doesn’t want to function properly, but ultimately it’s unproductive.

As humans, if we’re feeling slower than normal, less focused, or have a lack of motivation, it’s important to lean into those cues.

Some ways I’ve learned to ease the drag are to:

- Defer some tasks to tomorrow or another time,
- Ask for help, or
- Just step away for a good 10-30 minutes.

Once the moment is dealt with, I like to reflect on what happened. When I have a sense of it, I can create a plan to avoid it next time.

I’m grateful that this new opportunity afforded me enough

disruption to shift my mindset positively. It put me on a journey to becoming more organized and productive. The above are six things that have helped me thus far, but I have a lot of learning still to do and would love to learn from you. Speaking of which…

Over to you! What tips and tricks have you picked up that have made a big difference? I'd love to hear the stories behind them, too! Feel free to reach me via the social channels listed on my Start Page.

https://buffer.com/resources/impactful-habits/