


3 Steps To Better Business Results

What You Need To Know, Before You Go!

1
READY?

2
SET?

3
GO!



**How to gain greater control
over business outcomes**

Your results. Your way.

✓ **Smoother cash flow**

✓ **Higher profit**

✓ **Greater personal satisfaction of all involved**

Today's Date	Intaker's Initials
--------------	--------------------

PROJECT OVERVIEW

INTRODUCTION / PURPOSE OF THIS METHOD | If you want better business results faster, then use this method. This method has been distilled from dozens of years of input on what works, by hundreds of our founder-lead business clients, who take charge of business outcomes. The purpose of this method is to map out on paper what you are choosing to spend your hard earned capital on--before you spend it. Remembering every action in business has a obvious and hidden impact on productivity and profit. As initiator or leader, who is choosing to take action, it is your job to make sure you know as much about the hidden impact as you can. Take charge of results and your future by using this method.

PROJECT NAME _____

DEPARTMENT : ADMIN FINANCIAL MANAGEMENT MARKETING--SALES
 ORG DEVELOPMENT PERSONNEL PLANT/TECHNOLOGY PRODUCTION RESOURCES

ROI | PAYOFF MAKE \$, SAVES OR TIME, IMPROVE WHAT QUALITY?

Yes, proceed No, do not proceed, Yes, at a later date: _____ FORMS TO USE TO COMPLETE THIS MISSION: Goal Setting / Action Plan. MAP, DWMQA Check List, your schedule

PHASES TO MONITOR

1
READY?

Phase 1 | Open | Decision Task Project Meeting Work Session Dialog
PURPOSE OF THIS PHASE is to determine what / if this action will deliver the desired return on investment
 Scope the project by completing a Goal Setting/Action Plan on it before proceeding

2
SET?

Phase 2 | Plan | Pull forms Prepare Copy To All Finalize Approvals
PURPOSE OF THIS PHASE is to collect facts and refine project scope by incorporating the input of everyone involved, potentially involved or impacted, before proceeding
 Set up a working file and MAP and use those document as your controls / management agenda
 Gather all relevant documents and copy to the file
 Prepare all questions needing to be answered by participants and copy to the file
 Seek out and gain agreement on goals, roles and expectations of all involved before proceeding

3
GO!

Phase 3 | Execute | Meet Do The Work | Communicate | Update Weekly
PURPOSE OF THIS PHASE is to lead team by planning ahead and remaining prepared
 Secure and allocate necessary resources; money, people, equipment. Fund the project
 Meet with each team member involved via email, phone or face to face, whichever is best for them
 Communicate with all stakeholders on progress and expectations daily or weekly
 Anticipate challenges and actively seek to resolve issues or overcome obstacles by going directly to the initiating party

Phase 4 | Direct & Redirect | Lead Communication Redirect Reset goal
PURPOSE OF THIS PHASE is to monitor progress and redirect actions of team using documents
 Correct course and document by initiating/remaining in regular communication with teammates using your DWMQA schedule and calendar
 Collect and evaluate changes in the project requested by all involved using Coaching model
 Reprioritize and reschedule as needed by collecting inputs of those effected
 Shift resources as needed and maintain Meeting Note documentation--file
 Reduce, refine or simplify the scope based on gathered feedback
 Return to the planning stage to adjust project goals, steps, resources, timeline, budgets
 Gain agreement on revised scope and project needs--on going, weekly with each teammate

Phase 5 | Complete | Finalize | Celebrate!
PURPOSE OF THIS PHASE is to officially recognize success and identify what works for replicating in similar future projects
Prepare final reports; proof, edit and finalize documentation
 All stakeholders sign off as completed agreeing through meetings and documentation
 Survey all participants for project management education and customer satisfaction
 Review projects process and accomplishments with all involved
 Present final report date: _____
 Celebrate success as a team date: _____
 File final report date: _____
 Retire documentation date: _____

NAME:	START DATE:
CO.:	FINISHDATE:

SUBJECT:

GOAL:

PLAN/STEPS:

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____
- 7) _____
- 8) _____
- 9) _____
- 10) _____

MEASURABLE RESULT: WHAT WILL BE DIFFERENT? PAYOFF TIME LINE | DEADLINE

DEADLINE:	FOLLOW-UP DATE:
-----------	-----------------

RESOURCES NEEDED: WHAT, WHO, BY WHEN, HOW MUCH\$?

YES | This is a goal worth pursuing and I am committed _____ (signature) _____ (date)

NO | I choose not to pursue at this time. Review again by _____ (date)



3
GO!

Daily Schedule

On the road to your destiny,
focus on the horizon is the key.

M T W T H F S S / /

When		Who To Do	What To Do
7:00			
7:30			
8:00			
8:30			
9:00			
9:30			
10:00			
10:30			
11:00			
11:30			
12:00			
12:30			
1:00			
1:30			
2:00			
2:30			
3:00			
3:30			
4:00			
4:30			
5:00			
5:30			
6:00			
6:30			
7:00			
Special Notes For The Day			

Schedule Prep Every Day



Self Prioritizing Mtg.

Batch phone messages

- calls for _____
- calls for _____
- calls for _____

Review To Do's

- Today
- This Week
- Next Week
 - Take-offs for jobs
 - Action plans
 - Meet deadlines
 - Schedule work
 - ID needs of project
 - Hand-off To Dos
- Prep Requests e/task
- Support Instructions
- Labor Instructions
- Peer Requests
- Communication/s

Tasks To Hand-Off

Office

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

PRODUCTION

- _____
- _____
- _____