

WORKSHEET 3.1

Determining Metrics

Instructions: Answer these questions as a group at your next team meeting. Use the answers to help you narrow and focus your list of the metrics to track regularly.

1. Why does this team exist? In what ways is it expected to contribute to the company?

2. What are our current department metrics, and what is our current level of performance on these metrics?

3. Do these measures indicate how well our department is performing against the key areas to which the company expects us to contribute?

4. If we were to ask our key internal or external customers, would they think these metrics were most important? If not, what indicators would our customers advocate we measure?

5. Can we do well on these metrics and produce poor results? If so, why?

6. If we could look at only two indicators to determine the team's results, what would those two indicators be? What's the best way to measure those indicators? At what frequency should we measure and review them? Who should own the collecting and communicating of data? How are we performing against these metrics today—do we know?*

7. How should we move forward?

*If the answer is "no," get that done very rapidly and have another quick review meeting with the team.

WORKSHEET 6.1

Defining Excellence

Instructions: Describe performance excellence for each performance factor.

Performance Factor	How You Define Excellence for This Factor
Communication	
Collaboration	
Professionalism	
Creativity and innovation	
Project performance	
Meetings	
Problem identifying and solving	
Change and agility	
Results and performance	
Team and organization	

WORKSHEET 7.1

Weekly Planning Checklist

Instructions: Use this planning checklist to set aside time and energy for the most important work tasks. Start by defining a grand-slam home run goal for the week (an accomplishment that would make a significant positive impact on the department, project, and/or company). Write down two to four items for the other planning elements and then use this information to plan your week. Review and revise this worksheet daily or as needed.

Planning Element	Your Plan for the Week
<i>Grand-slam home run for the week:</i>	
Meetings and conversations I need to schedule	
Decisions needed, and by whom	
Coaching and developing for the week	
Any <i>must-not-miss</i> items	
Potential barriers to hitting the grand slam for the week	

WORKSHEET 7.2

Daily Planning Checklist

Instructions: Transfer your weekly grand-slam home run goal from the weekly planning worksheet. At the beginning of each day, take 10 minutes to define the actions you intend to take for each planning element. Carry this checklist with you to meetings and review it midday to ensure you're on track and focused on the right work.

Planning Element	Your Plan for the Day
------------------	-----------------------

Gland-slam home run for the week (transfer from weekly checklist):

Two or three actions I can take today that will make the greatest difference	
--	--

Team focus—any adjustments to be made	
---------------------------------------	--

Barriers I need to obliterate	
-------------------------------	--

Meetings and preparation needed	
---------------------------------	--

WORKSHEET 10.1

Creating Your Legacy Vision

Instructions: Think about the legacy you want to leave for each of the aspects of management listed in the left-hand column. Write your legacy goals for each aspect of management in the spaces provided in the right-hand column.

Aspects of Management	The Legacy You Want to Leave
Results and contribution to the business	
Team health and development	
Peer partnership and collaboration	
Creativity and innovation	
Processes and practices	
Workplace culture	
Systems and structure	
Change and agility	