

Worksheet

The Edge Team Training

Module 2 – Session 1

CUE

Intro

Find time for the significant, not just the important. You can be creative and organized. To do that, you need a system you trust to free your mind. You can grow your reputation for doing what you say when you say you will do it.

Concept

- Paper is the control.
- Technology is the tool

CUE

- Capture to-dos and key information
- Use the system consistently so that you start to trust it
- Enhance the system using Kaizen

Dos and Don'ts

- Have only one source
- Your mind needs white space to help your mind map where things are on the page
- Create spaces for mind mapping – need to be free to leave white space
- Right Page – active notes
- Left Page for Contact info (top), Money (middle), Ideas (Bottom)

To-Do List

- Every Monday morning create a new to-do list on a new page
- Place items you want to complete for THIS WEEK
- Transfer incomplete To Dos from last week to the new list.
- When transferring ask: Can I:
 - Delete this?
 - Delegate this?
 - Delay this?
 - Automate this?
- One to-do list: personal and business in one list
- Number the to-do items
- Put an "X" over the number when completed
- Circle number on the priority items

Left Side Use

- Top: Contacts that you may not want to keep in your electronic contact manager
- Middle: All things money related: Write down the date, amount, who
- Bottom: Capture ideas

Meetings

- Right side: Start a fresh page
- Top right: Date
- Top Left: Who
- Only write down decisions made: Who, what, and by when
- Circle any items that you have to do
- Directly after the meeting add these items to your to-do list
- Put an "X" over the circled items to show that you have acted on these items and do not need to review them again.

Projects or Training Notes

- Start a fresh page
- make notes for the projects
- Circle your action items
- Place these circles items on your to-do list

- Put an "X" over the circled items to show that you have acted on these items and do not need to review them again.

Lists

- Start a fresh page
- Dog ear that page
- Lists are for weekly or monthly tasks
- You do not add these items to your to-do list
- Examples:
 - Monthly steps for billing customers
 - Packing for a business trip

Kaizen

- Tiny improvements every day
- Try to avoid large reorganization
- Tiny incremental changes over time will transform your performance
- Kaizen is a lifestyle
- Fix the flaws as you find them. Do not use flaws to trigger a complete reorganization