

Worksheet

The Edge Team Training
Module 7 – Session 1

Shaping Up Work That Matters

Create your first pitch by following these steps:

A. SET BOUNDARIES

Start with your appetite – how many deep work sessions will you commit to this? If you are doing 1 deep work per week, then you know how many weeks it will take. You already have time to do the project because you have at least one deep work session allocated to every week.

1. Appetite: Set a date and TIME (measure in deep work sessions since you have other work to do too).

- _____
- EXAMPLE: Two deep work sessions (1 Week because I am doing 2 deep work sessions per week). Since today is April 2, I will present my project on April 9.

2. What problem are you solving?

- _____
- EXAMPLE: I am finding a way to get QuickBooks online data into a Google sheet so that I can build a real-time dashboard in the future. The team does not have real-time information to do their work well.

3. What is included?

- _____
- EXAMPLE: The Google sheet will be populated with the Profit and Loss Statement from Quickbooks Online using a Google Sheet Plug-in or some other method.

4. What is not included?

- _____
- EXAMPLE: It will not include any other data from QuickBooks. It will not automatically update every hour or every day.

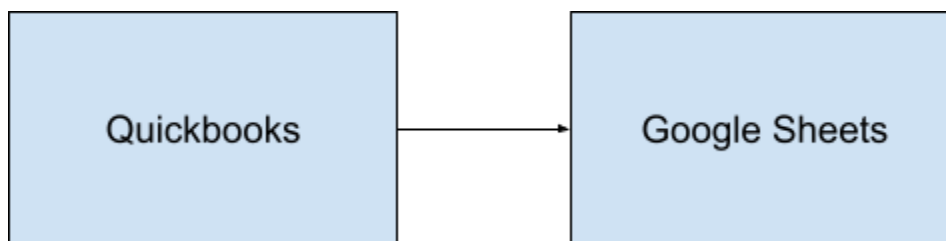
B. FAT MARKER DESIGN

1. What is the deliverable?

(Guidelines: – Keep it high level, rough, and solved)*

- _____
- EXAMPLE: I will deliver a Google Sheet with the data imported from Quickbooks and a note about how I did it – which Plugin Worked.

2. Do a rough drawing (if applicable).



C. RISKS & RABBITS

1. What could get us stuck?

- _____
- EXAMPLE: I could get lost in all the options and settings or have too many plugins to choose from. I will find 2 and try them both and pick the best one.

2. How would you expand or add to the solution (if the project goes well)?

- _____
- EXAMPLE: I will try to automate the process so the Google Sheet is updated every day automatically.

3. What things could be cut out (if the project does not go well)?

- _____
- EXAMPLE: I could list the two plugins that could work even if I do not get them to work.

D. MAKE THE PITCH

When you pitch your team:

1. Show them this worksheet
2. Get their Feedback
3. The Clock starts ticking after your pitch.