Brendon Burchard’s
1-PAGE PRODUCTIVITY PLANNER

PROJECTS

Project #1: ______________
5 big things I must do to move this project forward:
1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________

Project #2: ______________
5 big things I must do to move this project forward:
1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________

Project #3: ______________
5 big things I must do to move this project forward:
1. ______________________
2. ______________________
3. ______________________
4. ______________________
5. ______________________

PEOPLE

People I need to reach out to today.
List the people you have to reach out to today no matter what:

People I’m waiting on.
List the people who you need something from to move forward:

PRIORITIES

The main things I must complete today, no matter what.
List the priorities and to-dos that must be accomplished today and DO these before getting trapped in your inbox and other people’s agendas.

________________________________________
DATE: __________________________

*Beware of your inbox; it’s nothing but a convenient organizing system for other people’s agendas. Your goal is to always keep the main thing the main thing in your life, whatever it may be. Focus today. Use your psychology, physiology, productivity, and persuasion skills to amplify your energy and results. It’s your time. Today: Live. Love. Matter.” – Brendon Burchard, Founder of High Performance Academy. Get free videos at HighPerformanceAcademy.com.
Meetings Matter by Paul Axtell

The 4 C’s of An Effective Conversation

“The problem with communication is the illusion that it has occurred.” –Sigmund Freud

The four C’s are clarity, candor, commitment, and completion. If we think of a meeting as a series of conversations, then having an awareness for the four keys to effective conversation gives people something to pay attention to and put into a conversation when one of the pieces is missing.

**Clarity** means that everyone understands what is being said in the same way. This requires a back-and-forth conversation in which people have permission and feel safe to question what is being said. Clarity is more apt to be missing if a senior manager is in the meeting because people will push back on colleagues but not on managers.

**Candor** means that everyone is willing to say what they think. It means being authentic, honest, and straightforward. It’s about knowing where everyone stands on an issue. Without candor, you sacrifice ideas and alignment.

**Commitment** means you agree on who will take what actions and in what time frame after the meeting. Without specific commitments in time, you should not expect anything to happen. This is not micromanaging or not trusting. This is simply good project management.

**Completion** means that everything that needs to be said or asked has been expressed before you move on to the next topic. If you leave with things unsaid, you can’t expect people to be clear or aligned.

3 Objectives for an Effective Meeting

1. The most important objective is to accomplish the agenda: Have the right things on the agenda, and then address each topic thoroughly so you end up with clearly defined action, commitments to deadlines, and a plan for follow-up.

2. Manage the conversation in a way such that everyone’s experience of being in the meeting is positive. Balance the participation levels. Ensure that each person is heard. Remove all distractions.

3. Always be working on getting better at running meetings—have some process idea or skill you are working on—perhaps for a week or two. It might be calling on people. It might be getting specific commitments. It might be devoting your attention to people when they speak. Improving individual and group competency at meetings is a long-term process.
# {NAME} Meeting Agenda

## Meeting Information

<table>
<thead>
<tr>
<th>Objective:</th>
<th>Location:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date:</strong></td>
<td><strong>Location:</strong></td>
</tr>
<tr>
<td><strong>Time:</strong></td>
<td><strong>Meeting Type:</strong></td>
</tr>
<tr>
<td><strong>Facilitator:</strong></td>
<td><strong>Note Taker:</strong></td>
</tr>
<tr>
<td><strong>Attendees:</strong></td>
<td></td>
</tr>
</tbody>
</table>

## Preparation for Meeting

### Please Read:

#### Action Items from Previous Meeting

<table>
<thead>
<tr>
<th>Item</th>
<th>Responsible</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>All</td>
<td>Monthly</td>
</tr>
<tr>
<td>2</td>
<td>All</td>
<td>Monthly</td>
</tr>
<tr>
<td>3</td>
<td>{name}</td>
<td>Done</td>
</tr>
<tr>
<td>4</td>
<td>{name}</td>
<td>Done</td>
</tr>
</tbody>
</table>

## Agenda Items

<table>
<thead>
<tr>
<th>Presenter</th>
<th>Time Allocated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>{name}</td>
</tr>
<tr>
<td>2</td>
<td>{name}</td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

## New Action Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Responsible</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Other Notes or Information
Agenda Tips

1. **Objective** ~ Meeting objective is essential – include in printed agenda circulated in advance and start meeting by declaring it out loud. Purpose can vary by topic and may include:
   - Seek input for a decision
   - Make a decision
   - Discuss information
   - Resolve issue
   - Get approval

"It's difficult for team members to participate effectively if they don't know whether to simply listen, give their input, or be part of the decision making process. If people think they are involved in making a decision, but you simply want their input, everyone is likely to feel frustrated by the end of the conversation." Roger Schwarz  Most okay if not decision maker if understand objective is input (transparency of role is key)

2. **Note Taker** ~ Difficult to lead and simultaneously capture comments (action items). Goal is for minutes to be distributed within 24 hours of meeting. "The palest ink is better than the best memory." Chinese proverb

3. **Pre-Read** ~ Documents to read prior to the meeting along with a purpose for their inclusion.

4. **Action Items** ~ Already highlighted in minutes, but included in agenda to assure nothing slips through the cracks.

5. **Agenda Items** ~ No more than 6 topics to be effective. Think about natural sequence between some topics to determine order. Some build on what gets produced with others? Tough first, then less challenging on rotation to facilitate participation. Participants who may not be at entire meeting may influence order.

6. **Presenter** ~ Differs by topic; engages participants and allow leader to focus attention elsewhere.

7. **Time** ~ Varies by topic but keeps meeting on track.
Many things can go wrong in meetings. Someone rambles on. The talk moves far off the topic. One item eats up all the discussion time. No one knows when the meeting goals have been achieved.

To make things go right in the meetings you plan and lead, create an agenda. A solid agenda can reduce or eliminate all kinds of meeting time wasters and failures. Follow the tips below to create agendas that lead to efficient, productive meetings. If any tips do not seem to apply to your meetings, you may decide to ignore them. But first consider their underlying purpose.

1. **Start the agenda with the name of the meeting.** For a regularly scheduled meeting, the name may be as simple as "Quarterly Business Meeting." For an ad hoc meeting (that is, one created for a specific purpose), work the purpose into the meeting name, for example, "Retreat Planning Meeting," "Launch Meeting for Department Audit," or "Marketing Meeting to Discuss and Agree on Next Steps."

2. **Include the location, start time, and end time** of the meeting at the top of the agenda. Attendees need this information to add your meeting to their calendars, so include it prominently. Always have a meeting end time, or you risk having an endless meeting.

3. **Give the name of the meeting leader and his or her contact information,** unless the name and information are obvious. Invitees may have questions or concerns about the meeting.

4. **Include the list of invitees by name or by category** unless the list is obvious. (For instance, everyone on the team would obviously be invited to the team meeting.) A category of invitees might be all safety trainers or all department representatives. The list of invitees helps people understand the focus of the meeting and why they are invited.

5. **List each agenda item,** using language that describes what you want to happen. For example:
   -- Approval of meeting agenda.
   -- Presentation of security policy updates
   -- Announcement and Q&A on new sales goals.
   -- Report on survey data.
   -- Discussion and assignment of patient care tasks.

   If the list above were simply "Meeting agenda," "Security policy updates," "New sales goals," "Survey data," and "Patient care tasks," the respective approval, presentation, announcement, etc., could be derailed by unwanted, lengthy discussion. Only if you want discussion should you include that word, as in the example "Discussion and assignment of patient care tasks."

6. **State a time allotted for each agenda item** unless you have only one main item such as "Discuss and vote on the draft budget." Without time allotments, one agenda item can dominate a meeting, leaving you with little authority to end the discussion. Be realistic about time limits. Check with any individuals who are presenting agenda items to be sure they are aware of and agree with the time allotted.
7. **Include the names of individuals who will present or facilitate each agenda item.** Be certain they are aware of their responsibility, and get written agreement or confirmation from them. At too many meetings, one or more people announce, "I didn't know I was supposed to present this topic"; then they fumble ahead. What a poor show of talent and a waste of time!

8. **Include the expected outcome for each agenda item,** unless it is already included in the name of the item. For example, if the agenda item is "Vote on new officers," the outcome, of course, is the vote. Think of the outcome as the result or goal of the discussion, presentation, etc. Consider these agenda items and their outcomes:

   --Item: Decide on behavioral interviewing questions.
   --Outcome: List of 6 to 10 interview questions.

   --Item: Discuss and decide on potential panelists.
   --Outcome: List of 3 to 5 panelists to invite.

   --Item: Discussion of audit milestones and their timing.
   --Outcome: Agreement on milestone schedule.

   --Item: Agreement on a bid and proposal strategy.
   --Outcome: List of talking points and bid factors.

   --Item: Announcement and Q&A on new sales goals.
   --Outcome: Sales reps' acknowledged understanding of new goals.

   --Item: Decide on agenda for next meeting.
   --Outcome: A list of agenda items.

Outcomes lead to a feeling of accomplishment: When attendees have reached the outcome, they can happily move on to the next agenda item. And outcomes help keep the meeting on track. For example, if an outcome is "List of 6 to 10 interview questions," any discussion of who the interview candidates are is likely to be off topic. The meeting leader or another attendee can legitimately ask that the discussion return to the interview questions.

9. **For each agenda item, highlight any preparation that is required or requested.** For example, if an item is "Choose a retreat facilitator," meeting attendees should bring information about any facilitators they want to recommend.

10. **If attendees must read any reports in advance,** be sure to emphasize and attach or link to the reports. Give at least 48 hours to read them. Do not expect people to read reports just hours--or minutes!--before a meeting.

If you are not the meeting leader or planner, insist on an agenda if your role allows you to do so. If you are invited to a meeting without an agenda, respond, "Before I commit to the meeting, may I please see the agenda? I need to determine whether I have something to contribute." Some smart companies have this rule: No agenda, no meeting.
Ground rules for effective time together:

1) Start & end on time;
2) Clarify purpose of each agenda item;
3) Everyone participate;
4) Listen to each other;
5) Be respectful of various views;
6) Okay to disagree;
7) No multitasking (checking e-mail);
8) Start with the conclusion when sharing;
9) Open to new ideas; and
10) Decisions by consensus.
Meeting Designs by Paul Axtell

STARTING A PROJECT
formation

Time spent up front on the design and formulation of a project will pay off.
1. Define overall outcomes committed to achieve
2. Describe what success looks like
3. Set important dates from start to finish
4. Determine milestones to give sense of progress
5. Determine required resources
6. Define relationships you will develop. Stakeholders
7. Set of actions for next few weeks for good start-up
8. Follow up by deciding when and how often to have check-in progress meetings

CHECKING PROGRESS
on projects, goals or initiatives

Many Checking Progress updates should be done via email. This design is for a conversation that allows time to discuss the project and fully clarify where it stands. Think of them as steps used to think through a topic.
1. Current status (schedule, cost, resource allocation, quality)
2. Clarifying questions re status
3. Status in relation to intended goal (behind schedule or difficulties)
4. Agree on actions – get commitments
5. Set date to check progress again

REQUESTING INPUT
from the group

One way to leverage the thinking of a group is to fully describe a problem or situation and then assign further work to a small group. When you need input from a group to describe or analyze a situation, these are the steps to work through in the conversation.
1. Describe situation (bring group up to date)
2. Explain viewpoint and questions for the group (define input needed)
3. Open for conversation (reactions, questions, ideas)
4. Acknowledge what said (feel heard)
5. Check in with people who haven’t spoken
6. Summarize what heard and takeaways
7. Explain plan to do with their input
8. Check if anyone has reservations about next steps (alignment)
RESPOND TO PROBLEM

**group wisdom**

Problems deserve and benefit from thinking of the group. When a problem has occurred and you need the wisdom of the group to help resolve it, these are the steps to work through in the conversation.

1. Describe situation thoroughly
2. List questions to be answered
3. Define what should be considered before decision made. Determine criteria to evaluate options
4. Explore available options
5. Open conversation for additional thoughts
6. Decide what to do next based on responses. List specific actions. Next steps

MAKING A DECISION

**ownership**

When people speak about the need for transparency, one of the areas they are pointing at is decision making. Adding decision making to your meetings also allows more people to develop ownership for decisions made there. These are the steps to work through in reaching a group decision:

1. State required decision
2. Discuss who has decision rights and process. Better understand how to contribute to conversation
3. Outline criteria for successful outcome and how determine best option
4. Define all options
5. Outline upsides and downsides associated with each option
6. Make decision
7. Check for alignment
8. Identify people who need to know what happened in conversation
9. Given decision, define what must be done within next two weeks. Next steps

CREATE ALIGNMENT

**function as whole**

Leaders or groups are likely to seek alignment when defining goals, making decisions, or formulating strategic plans. When it's important to have everyone in the group on board with the outcome, these are the steps to follow to reach alignment:

1. Describe what like to do and how intend to do it. (clear outcome and path)
2. Find out what people are thinking. Open ended questions for expression
3. Clarity – permission to express differing views
4. Ask others to see value. People may understand proposal but if don’t see value, probably won’t align
5. Ask if concerns. If identify concerns, can address them.
6. Once know what’s in way, ask whether anything missing to make a difference in alignment if included
7. If promise to address their concerns and request, they are now able to align with decision or plan
Bring Meetings to a Close Effectively
Adapted from “How to Override Your Default Reactions in Tough Moments,” by Lee Newman.

A common complaint among managers is that despite holding so many meetings, few meetings actually produce results. “We keep talking about the same issue over and over, but nothing seems to ever happen!” The issue? Most meetings lack closure — the necessary link between meeting and impact. To deliberately and effectively close a meeting:

- **Check for alignment:** Ask, “Is everyone OK with where we ended up?” to surface any questions or concerns, and to ensure that everyone is on the same page.
- **Agree on next steps:** Ask, “What needs to get done before our next meeting?” Nail down specific commitments, concrete deadlines, and follow-up schedules.
- **Reflect on what you accomplished:** Say, “These are the five things I’m taking away from this,” to validate the conversation and the team.
- **Check for acknowledgements:** Did anyone contribute to the conversation in a way that needs to be highlighted? Give people credit.

The Right Way to End a Meeting
Paul Axtell

A common complaint among managers is that the conversations they have with employees aren’t producing results: “We keep talking about the same issue over and over, but nothing seems to ever happen!” That’s because most managers are missing a vital skill: the ability to deliberately close a conversation. If you end a conversation well, it will improve each and every interaction you have, ultimately creating impact.

Meetings are really just a series of conversations — an opportunity to clarify issues, set direction, sharpen focus, and move objectives forward. To maximize their impact, you need to actively design the conversation. While the overall approach is straightforward — and may seem like basic stuff — not enough managers are actually doing this in practice:

- **Set up each conversation** so everyone knows the intended outcomes and how to participate.
- **Manage the conversation rigorously** so the discussion stays on track and everyone is engaged.
- **Close the conversation** to ensure alignment, clarity on next steps, and awareness for the value created.

In my 35 years of experience as a corporate trainer, I’ve found that closure is more often than not the missing link between meetings and impact. Without it, things can be left unsaid, unchallenged, unclear, and/or uncommitted. Each agenda item should be considered incomplete unless it is wrapped up in a thoughtful, deliberate way.

I recently worked with a university president who requested that I come in to help with some leadership training. When I asked why the training was needed, he told me how he had been working with a group of faculty members who were trying to restart a journalism school that had been disbanded many years before due to budget cuts. In the initial meeting, the president promised he would do everything he could to support their efforts.

**How to make them more productive.**

But now, two years after convening and chartering the group, no visible progress had been made. The president felt it was because of a leadership gap, but I offered a different perspective. I told him, “You don’t have a journalism school because you didn’t close that first meeting properly, and you didn’t follow up. If you had wrapped up that first meeting more thoroughly and then met with that group every two weeks, you would probably have what you wanted today.” It really is that simple.

To deliberately close a conversation, consider these 5 essential tasks:
Check for completion: If you move to the next topic too quickly, people will either cycle back to the current topic later or they will leave the meeting unclear or misaligned. You should ask: “Is there anything else someone needs to say or ask before we change topics or adjourn the meeting?” If the university president had asked this question and waited patiently, lingering concerns or questions might have arisen and been dealt with right off the bat.

Check for alignment: If someone can’t live with the decisions being made in the meeting, or the potential outcome of those decisions, you need to ask that person what it would take to get him or her on board. People prefer to be united with the group, and if they aren’t, there’s a reason behind it that needs to be surfaced. Asking the question, “Is everyone OK with where we ended up?” will surface questions or concerns so they can be resolved as soon as possible.

Agree on next steps: Getting firm, clear commitments is the primary way to ensure progress between meetings. In order for a conversation to lead to action, specific commitments must be made. Progress depends on clearly stating what you will do by when and asking others to do the same. To maintain the momentum of any project, nail down specific commitments and deadlines, and then follow up often. The question here is: “What exactly will we do by our next meeting to ensure progress?” In the example of the journalism school, nothing happened because there was never an action plan agreed upon with next steps, firm timelines, and individual responsibilities clearly defined.

Reflect on the value of what you accomplished: This is one of the most powerful acknowledgment and appreciation tools. People rarely state the value created by a conversation, and therefore lose a wonderful opportunity to validate both the conversation and the individuals in it. Here’s an example: Let’s say you’re the university president from the example above, listening to several faculty presentations for the new journalism school. After the first presentation, you say, “That was good.” What if, instead, you said: “Let me tell you the five things I’m taking away from your presentation.” Which do you think has more impact?

Check for acknowledgements: Did anyone contribute to the conversation in a way that needs to be highlighted? While you don’t want to use acknowledgement and appreciation so frequently that it becomes a commodity with no value, at times someone’s questions or remarks do help provide the tipping point that turns an ordinary conversation into an extraordinary one – and that’s worth acknowledging.

Imagine the impact if the university president had taken the time to use these last two elements – sharing the value he was taking away from the meeting and acknowledging a few of the participants. Doing so would have reinforced the conversations that occurred, supported the people in the meeting, and encouraged everyone’s desire to produce the expected results.

As a manager, you should consider improving your meeting skills to be a top priority. Not only will it make you a more respected leader, but your staff members will become more engaged participants, as well. Try spending the next three weeks working on closing every conversation in a deliberate, thoughtful way. You’ll be surprised to see an immediate impact on how and when things get done.
CHECK-IN QUESTIONS

1. What do you like about your job? When you travel to work each day, what things do you look forward to?
2. Can you tell me about a good day of work you had recently?
3. Do you feel you’re being used to your full potential in this job?
4. Is there something new in particular you want to learn this year?
5. Do you feel you are appropriately recognized for your contributions?
6. Do you have the right resources to perform successfully?
7. How could we more effectively take advantage of your strengths?
8. Are there any issues you've been grappling with that you'd like for me to address?
9. How is your relationship with your co-workers? Feedback on others?
10. If reviews were done differently, how do you think they could become more effective?
11. How can I be of greatest help to you as your manager? What should I do more of? Less of? What do I do that frustrates you?
Effective Meeting Questions

To help with **candor** - “What do you think?” and “Where are you on this?”

To help with **alignment** - “Is everyone OK with this?”

To help with **value** - “I’m leaving this meeting with a sense that we are going to do something and I appreciate the commitments people have made.”

To help with **completion** - “What else would anyone like to add or ask about this?” “Are there any lingering questions about this?” “I’m ready to change topics; are you good with where we are?” : “Is there anything else someone needs to say or ask before we change topics or adjourn the meeting?”

To help with **distractio ns** – “I’d love to stay with this conversation, but we should get back to the agenda.” “This sounds like an idea we should note and revisit at another time. Is that Ok with everyone?”