

Keeping Score

① Financial: Dot Your Calendar

- ◆ Create a legend for the colors of your removable dots e.g. red is for paid presentations, yellow is for time off (free days); blue is for professional development
- ◆ On a quarterly basis, identify your goal for each color – keep each quarter on a separate sheet
- ◆ Place the dots on your calendar when scheduled.

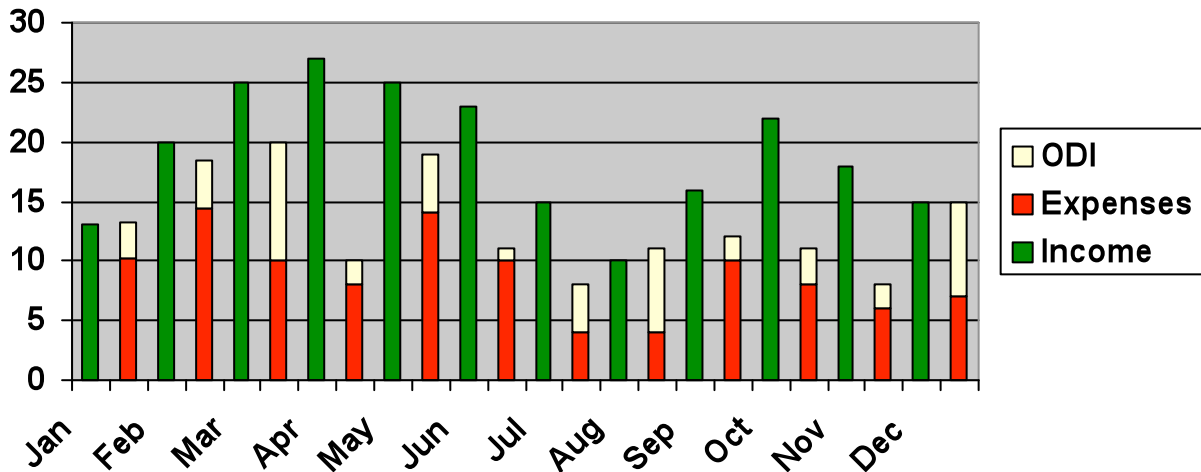
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

- **Paid Day**
- **Professional Development Day**
- **Free Day**

Dan Sullivan:

- ◆ Focus Days
- ◆ Buffer Days
- ◆ Free Days

② Financial: Income to Expenses



- ◆ Each month, tally your gross income and expenses.
- ◆ Enter into a bar chart.
- ◆ Note, if you want to show more detail:
 - Separate your expenses into categories e.g. admin/operations, marketing, professional development.
 - Personally, I like to separate my expenses to show my ODI (Other Discretionary Income which shows personal expenses I would normally incur; however the business is paying for them).

3 Customer: Referral Tree

- ◆ Each time you gain a new client, identify where that client came from.
- ◆ Insert the name of your “advocate” and the client’s organizational name in a spreadsheet.

Word of Mouth											
Bob	ABC	Cheryl	DEF	MNO							
			GHI	Marjorie	PQR	Mark	YZA	Doug	BCD	Tom	EFG
			JKL	Harry	STU						
				VWX							

Associations					
Ed	CINCLTFL				
	T				
	HIJ	Diane	KLM		
		Ron	QRS		
	NOP	Mary	TUV		
WXY	Monte	ZAB	Dennis	CDE	

Public Seminars			
Mary	The Daily Press		
	FGH	Tracey	IJK
	LMN		

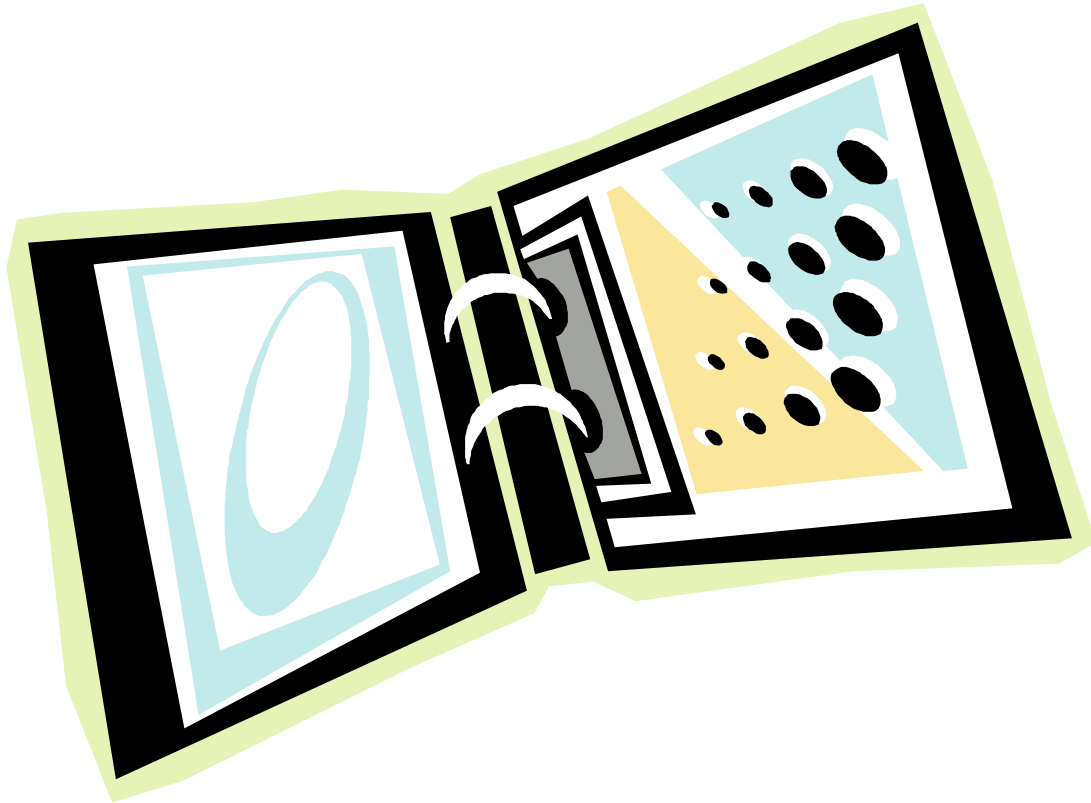
Internet	
Mark	OPQ
Lori	RST

Publicity					
Janet	UVW	Patsey	WYZ	Christine	123
	456				
Fran	789				

Bureaus and Brokers	
Mike	101
	112

④ **Customer: Brag Book**

- ◆ Collect copies of your testimonials, thank you cards, emails, pictures etc.
- ◆ Put them in one binder (especially good for a no-good, rainy day to lift your spirits up!)



6 Internal Business Process: Weekly Positive Focus

- ◆ Each week, identify the three most important things you want to do.
- ◆ At the end of the week, check off the items you completed and note three things additional items that you did.

Crucial Results				Weekly Positive Focus	
Free	Focus	Buffer	What are the 3 crucial results you want to accomplish this week?	✓	What were your most important accomplishments?
/	/	/	Week 1	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
			Week 2	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
			Week 3	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
			Week 4	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>
Week 5	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
Week 6	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
Week 7	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
Week 8	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
Week 9	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
Week 10	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
Week 11	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
Week 12	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			
	<input type="checkbox"/>	<input type="checkbox"/>			

⑥ Internal Business Process: Weekly Process Review

- ◆ Each week, take one business process and put it under the microscope.
- ◆ What is the outcome/benefit to the customer for doing this?
- ◆ How are we doing it now? Is this the best way or is there a better way to do it?
- ◆ Document the process in a “process guide”

Quality Process Consultants, Inc.

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Procedure Guide
Using the Scanner

Lay item to be scanned on the glass of the scanner

On desktop, double click HP Precision Scan Pro Icon (looks like a scanner with the lid open) to open program

Select Scan from the menu at the top

Select Preview (will say – warming up the lamp)

Using the cross pointer – select the area you wish to scan using your left mouse button (creating a square)

Once the square has been created, you can adjust one side more or less

Again select Scan from the menu at the top

Select Save As and save as you would any other file.

You can play around with the resolutions and color buttons if you want, but I usually do not.

7 Learning and Growth

- ◆ Blue dots on your calendar! (2-3 weeks)
- ◆ 10% of your budget (registration, travel, dues, reference materials)
- ◆ Create one new program/product every year and track your progress

