

Name:



**HOW TO RECRUIT, BUILD & LEAD**

**YOUR**

# **A TEAM**

**TO SUCCESS**

## WORKBOOK

— HOW TO —  
**MANAGE**  
A SMALL LAW FIRM

HAPPY LAWYERS MAKE MORE MONEY

# AGENDA

## SATURDAY

<b>SESSION 1: INTRO (60 MIN) + 90 DAY LOOK BACK (30 MIN)</b>	<b>9:00 AM - 10:30 AM</b>
<b>BREAK</b>	<b>10:30 AM – 10:50 AM</b>
<b>SESSION 2: RECRUIT (80 MIN)</b>	<b>10:50 AM - 12:10 PM</b>
<b>LUNCH</b>	<b>12:10 PM – 1:20 PM</b>
<b>SESSION 3: BUILD (80 MIN)</b>	<b>1:20 PM - 2:40 PM</b>
<b>BREAK</b>	<b>2:40 PM – 3:00 PM</b>
<b>SESSION 4: PANEL (60 MIN)</b>	<b>3:00 PM - 4:00 PM</b>
<b>BREAK</b>	<b>4:00 PM – 4:30 PM</b>
<b>SESSION 5: LEAD (80 MIN)</b>	<b>4:30 PM - 5:50 PM</b>
<b>BREAK</b>	<b>5:50 PM – 6:10 PM</b>
<b>SESSION 6: Q&amp;A (50 MIN)</b>	<b>6:10 - 7:00 PM</b>
<b>DINNER ON YOUR OWN</b>	<b>7:00 PM – 9:00 PM</b>
<b>UNPLUGGED SESSION</b>	<b>9:00 PM - 11:00 PM</b>

## SUNDAY

<b>SESSION 7: MINDSET (90 MIN)</b>	<b>9:00 AM - 10:30 AM</b>
<b>BREAK</b>	<b>10:30 AM – 10:50 AM</b>
<b>SESSION 8: 90 DAY ACCELERATOR PLAN (50 MIN) &amp; WRAP UP (20 MIN)</b>	<b>10:50 AM - 12:00 PM</b>

# SESSION 1

9:00 AM - 10:30 AM

“

I love it when a plan comes

together.

”

- John “Hannibal” Smith



**People**



**Marketing**



**Sales**



**Financial  
Controls**



**Factory**



**Physical Plant**



**You**

# MAXIMIZE YOUR ROI

1



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# The Hidden Cost of Your B-Team



**POSITION**

**PERSONAL**

**PRODUCTION**

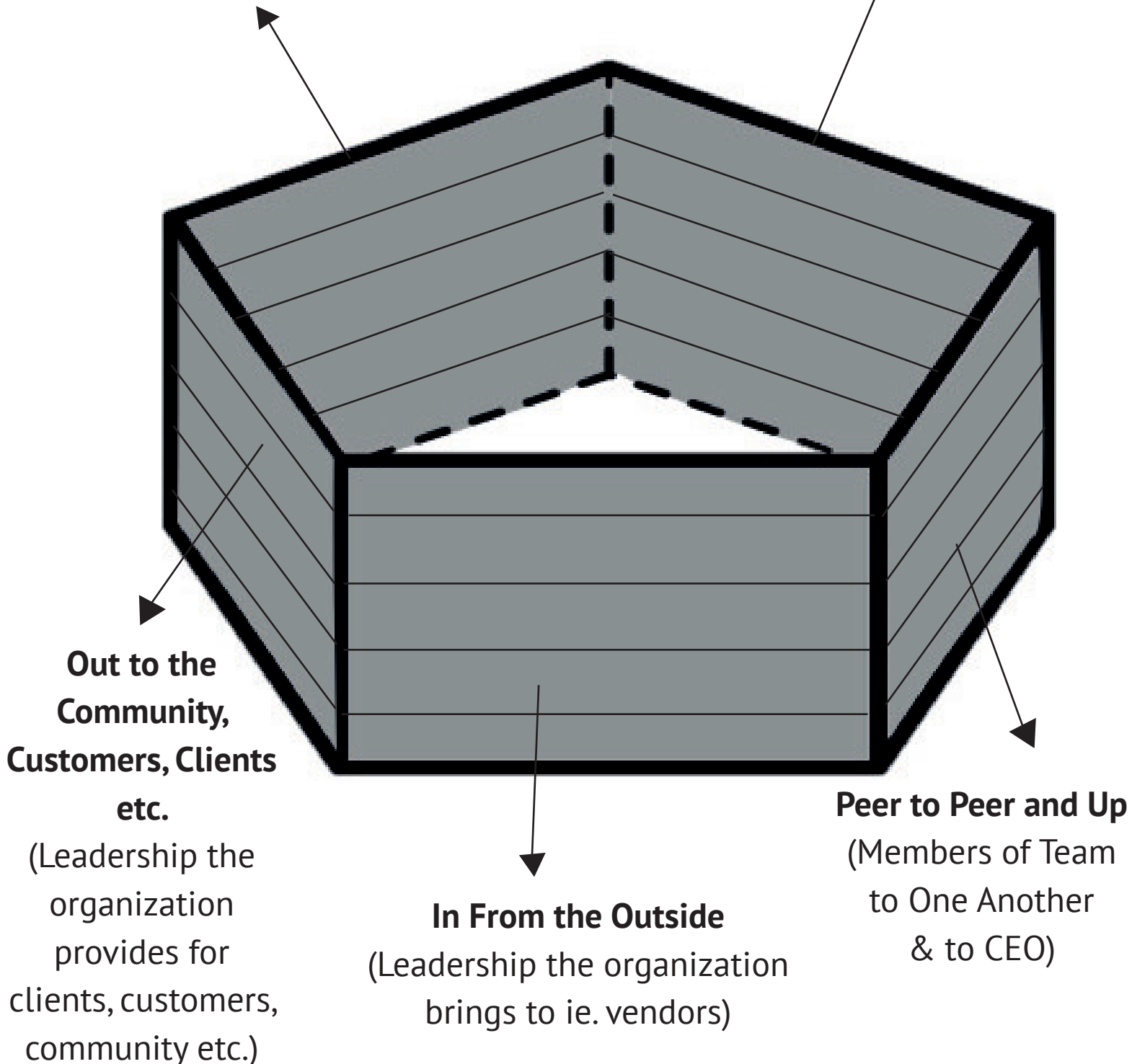
**PEOPLE DEVELOPMENT**

**PURPOSE**

## Back

from Customers) (Leadership your A Clients give back to your org... This is a big reason why they are called A Clients)

**Top Down**  
(CEO to Team)





**Agree with your  
investors.**

Your Complete Definition of  
**SUCCESS**

**Share it with the  
world.**

**Be sure it  
matches  
with your  
team.**

**LEADERSHIP =  
COACHING YOUR  
A-TEAM**

# BEST OF SESSION 1

	IDEA TO IMPLEMENT	BEST FIRST ACTION(S)
1	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
2	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
3	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
4	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
5	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
6	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	

Which idea on this page, *if implemented*, would have the biggest positive impact on your business and/or life?

#

# NOTES

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# SESSION 2

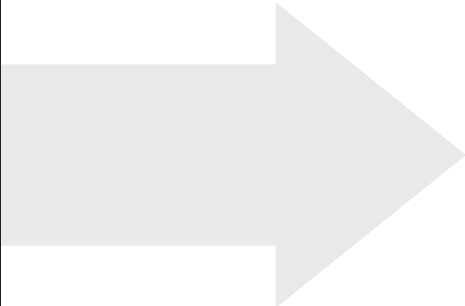
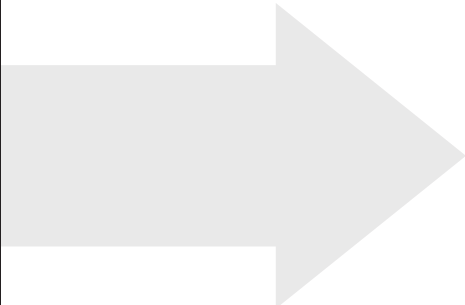

10:50 AM - 12:10 PM

**//** We gain freedom when we have paid  
the full price. **//**

- Rabindranath Tagore

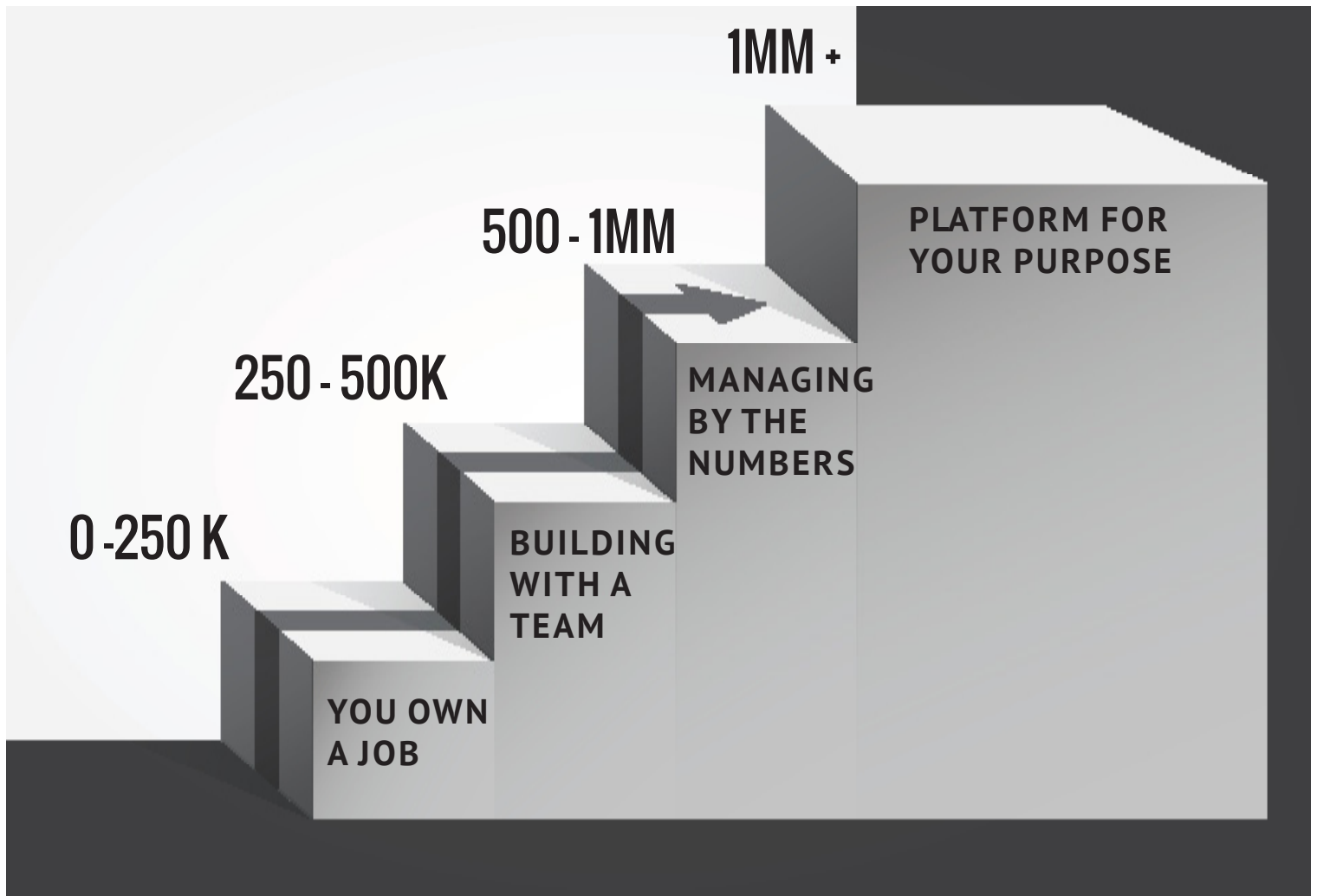
# THE 90 DAY LOOK BACK

What are your most important achievements from the last 90 days?

ACHIEVEMENT	HOW DOES THIS MOVE YOU [MEASURABLY] CLOSER TO YOUR GOALS?	FURTHER PROGRESS
FINANCIAL		
PERSONAL		
PROFESSIONAL		

# RECRUIT

# 4 STAGES OF GROWTH





# WHAT STAGE IS YOUR BUSINESS IN

## GRADING

**0-7 ->** Probably your environment is ruling YOU. Your life is mostly REACTIVE. Few choices. Little control. You may not even believe you can have a million dollar solo law firm. You may still think the only way to double your current revenues is to double your workload. And you're already working enough! There may be more evidence in your life and business right now that you cannot reach the next level of growth than there is evidence that you CAN. And it's very likely too, that the only company you have are others who are similarly-situated people who like to make a lot of excuses.

**Revenues are probably \$0-250K**

**8-10 ->** Very likely you feel very frustrated. Because you KNOW you have a lot of untapped POTENTIAL. But you feel like you can't get ahead. Some days you probably feel like you want to burn your office down and hide under the covers. Other days, you get a glimpse of the possibilities and feel inspired. If only you could get your business more under control and have more "good" days.

**Revenues are probably \$250-500k**

**11-15 ->** Most days you probably feel somewhat inspired. Depending on the velocity of growth in your business you may still wonder at how fast it can all happen and wonder if it's just a fluke. Ordering from the "left" side of the menu (the side without the prices) is beginning to feel natural. And it should! Because you're beginning to figure out that you can grow your business simply by using it as a vehicle to help more people. Even if you can't prove or explain or defend it to anyone else you know in your gut you could break the 7 figure barrier if only you could get some clarity around some key points about your business. And having a group of like-minded entrepreneurial peers to collaborate with, hold you accountable, and keep you motivated would certainly help too.

**Revenues are probably \$500k-1MM**

**16-21 ->** Now you know why highly-successful people the world-over say it's lonely at the top. You want to know what you're truly capable of. But most of the people around you cannot fathom why you still get up & go to work every day. They call you a workaholic. But that's only because they have no idea to love what you do. They don't understand. They think you're just being greedy to want to grow your business. You don't dare try to explain that your business only grows because it helps more people, and what's wrong with that? You can't talk about your favorite subject with your clients. Most of your friends & family have no real idea what it means to be CEO of a successful & growing business that grows by helping more people. And you dare not share your feeling with your staff.

**Revenues likely over \$1MM**

# I CAN EXPLAIN TO MY STAKEHOLDERS HOW EACH OF "THE 7 MAIN PARTS" OF MY BUSINESS ARE SUPPOSED TO WORK.

	CIRCLE ONE				SCORE
Marketing	0	1	2	3	
Sales	0	1	2	3	
Factory	0	1	2	3	
People	0	1	2	3	
Physical Plant	0	1	2	3	
Money & Meterics	0	1	2	3	
You	0	1	2	3	
TOTAL:					
÷ BY 7:					
TOTAL SCORE:					

## KEY

**0** - Never really thought about it before

**1** - I could explain but it would have to be verbal because it's not in writing.

**2** - I could show them something in writing but it's more than 24 months out of date.

**3** - I have this part of my business plan in writing and relevant to how my business currently operates.

# STAFF MATRIX

## STEP 1: IDENTIFY:

Who in your law firm is doing each of the jobs below (Hint: each of these jobs had better get at least one name under it. None of these jobs should have everyone's name under it!) (Note: If most of these jobs have your name under it and you've been running your own law firm for more than about 18 months, it is probably time you discovered second gear.)

## STEP 2: SCORING:

Mark points as follows:

- 1 point:* For every position that has at least one other name besides yours.  
*2 points:* For every position that has someone else's name is under it and not yours.

## STEP 3: MULTIPLIER:

- x 1:* If you have no written job description.  
*x 2:* If you have documented written job description that an "A" player could use to reasonably determine that they've done their job well.  
*x 3:* If you could lay your hands on a written job description within 10 minutes of entering your office.  
*x 4:* If, as you sit here, within 10 minutes (assuming internet access) you could get access to those written job descriptions.

**Now multiply your score as follows:**

## STEP 4: CATEGORIZE HOW EACH PERSON HELPS THE FIRM:

Everyone on your team should be

- A) helping you make more money,
- B) saving you money,
- C) saving you time,
- D) making you more effective, and/or
- E) giving you cause to have peace-of-mind.

Jobs in Firm	Name of (All) People Doing Job	Points	Multitplier	Total
Receptionist				
Secretary				
Paralegal				
Associate				
Rainmaker				
Manager/ Administrator				
COO				
CFO				
Owner				
CEO/Founder/ You				
Investor/ Stakeholder				

**BONUS:** Ask everyone on your team to give you, in writing, a list of what they do, how they would write their own job description and explain how that position helps your firm as outlined in A-E above.

# GAP

# ANALYSIS

(What do you need to recruit for)

## Gap Analysis

Front office: everyone sees - reception

Mid-office logistics; execution; business; program delivery

Back office: no one sees: financial;

0 = zero importance.

5= must be done

10 = absolutely important

Colors: gaps of 5+ in red; gap of 3-4 in orange; gap of 0-2 in green.

			How important is it?	How well are we doing it?	Who is doing it now?	Who should be doing it?	Gap
Receptionist			6				
Secretary			9				
Marketing Asst			8				
Office Manager/ Admin Asst			6				
Administrator			9				
Designer			7				
web developer			7				
IT			7				
Sales Persons			9				
CFO			8				
COO (PSPs)			8				
Rainmaker			9				

# The **HIDDEN** cost of your B Team

VALUE OF YOUR MOST PRODUCTIVE HOUR

—

COST OF GIVING THIS TO AN A PLAYER

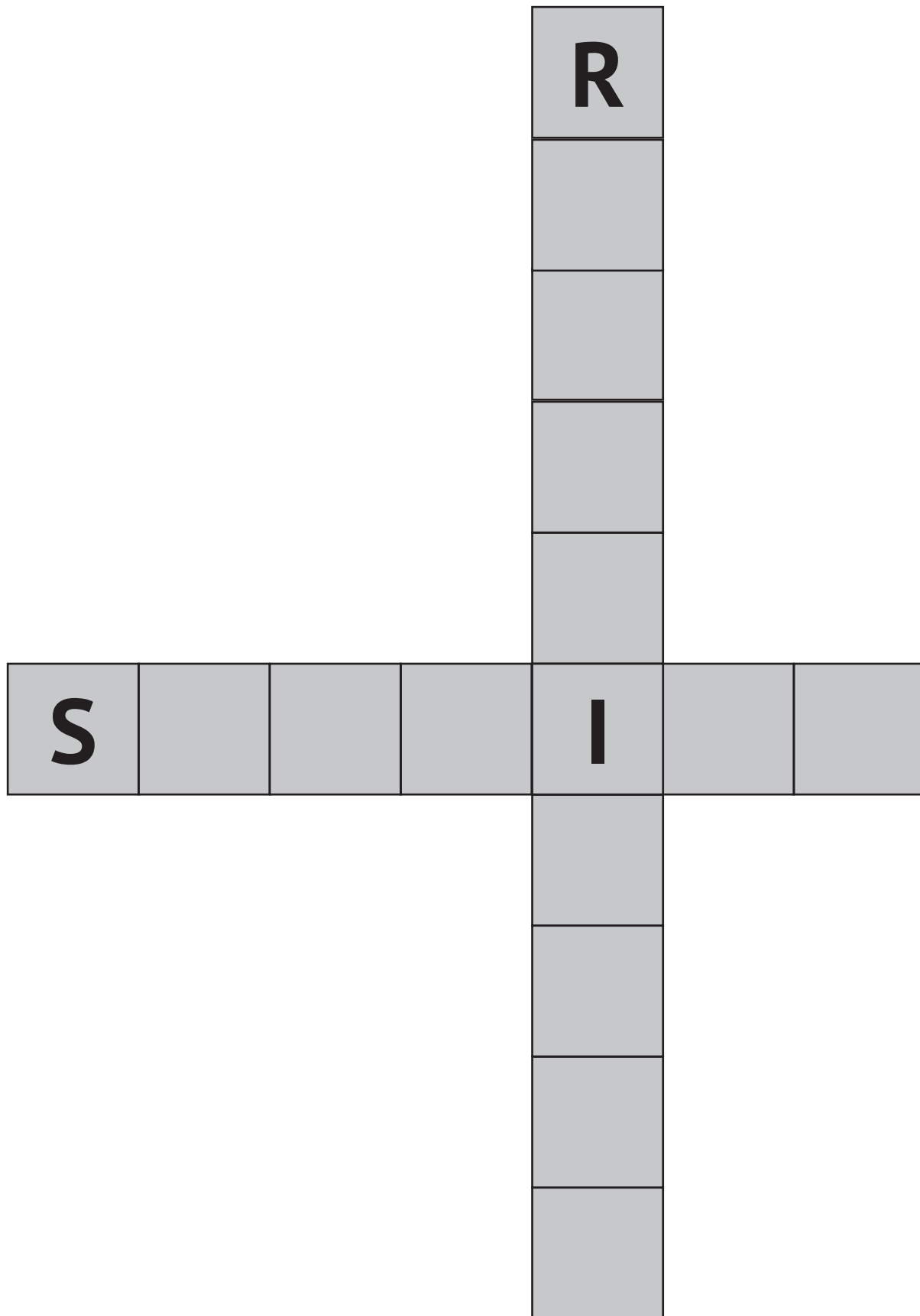
X

# OF HOURS YOU ENGAGE IN THIS ACTIVITY EVERY MONTH

=

COST OF NOT DELEGATING

# THE HIDDEN COST OF YOUR B TEAM



# RECRUITING PROCESS

- STEP 1:** Post a short “teaser” job description
- STEP 2:** From the short job description, the applicant should be forwarded to another website with a longer job description.
- STEP 3:** If the applicant is interested in job after reading longer description, they should be instructed to read a short passage, then send an email with a brief response about the meaning of the passage, attach their resume, and send the email with their name spelled backwards in the subject line.
- STEP 4:** Upon reviewing the resume & response, they are invited to take a longer quiz.
- STEP 5:** After receiving and reviewing the quiz result, applicant is either invited for an interview or their resume will be archived.



# Legal Secretary / Office Manager

## ABOUT US & THE JOB

Fast paced Coconut Grove Based professional services firm (we service the legal industry) has an immediate opening for an experienced legal secretary to provide support for one or more busy professionals including: opening and maintaining business, project and event-based files; project management with heavy emphasis on planning, scheduling and juggling priorities; drafting correspondence and memoranda; scheduling appointments and meetings; calendaring and tracking deadlines, coordinating meetings and logistics, extensive travel arrangements, submitting expense reports, calendar maintenance and handling of daily mail. Also responsible for maintaining various information lists including client/matter identification numbers, contact lists and marketing mailing list.

Must possess strong administrative, organizational and interpersonal skills; be highly detailed; able to multi-task; prioritize and manage technology for a very non-tech-savvy executive. Ideal candidate for this position will have at least 5 years of experience in a support role handling personal and confidential matters for busy executives.

### Qualifications:

The ideal candidate will have a minimum of 5 years of legal secretarial, executive secretarial or secretarial administrative assistant experience. Also requires skilled proofreading, spelling, grammar punctuation and math with proficiency in Outlook, Excel and PowerPoint. Must be tech-friendly. Ability to organize and prioritize workload and use own judgment in decision making to adequately and efficiently meet all deadlines. Ability to take the initiative in handling projects and anticipating what needs to be done. Ability to understand and follow specific and detailed instructions in oral and written form. Must possess flexibility and good humor.

We seek exceptional people who want to become a part of our team. To us the word "team" means we win together and we lose together so your contributions to our overall profitability and reaching our goals including stepping-up to anticipate problems, propose solutions and just generally demonstrate that you have your head in the game will be recognized, appreciated and rewarded. If you are motivated by job challenges and personal growth, then this could be the right place for you.

# Legal Secretary

## JOB DESCRIPTION

The job of the legal secretary is to provide full administrative support and personal assistance to a team of professionals, consisting of CEO, COO, Marketing and Business Manager. The appropriate individual should be able to assist in driving all projects from conception to completion, manage multiple calendars, take charge of office operations, and provide excellent customer service to all members. You should be able to work proactively and re-actively as an extension of the company, and bring a results-oriented approach and streamlined execution to every project.

### Principal Responsibilities:

- Docket control to include managing and maintaining the company calendar and executives' calendars:  
All calendars need to be treated as a continuous project, having no deadline, and always needing change and adjustment. There needs to be extreme attention to detail when scheduling appointments and maintaining the calendar. The entire business is based on calendared events.
- Assist in servicing members and clients:  
Answering general inquiries customers may have, monitoring a private members-only site to keep up with the business, sending flowers and care packages, etc.
- Creating, maintaining, archiving, scanning and retrieving departmental files, and maintaining cloud drive.
- Creating and updating contacts via database system as necessary
- Organizing, coordinating and completing all phases of multi-leg national travel arrangements; including booking of flights, accommodations, transportation, reservations, creation of itineraries, providing directions, and coordinating meetings:  
The executives of this company travel for weeks at a time. You will be responsible for all of the things listed above and anything else that they may need while they are away, including some personal errands.
- Document production - letters, emails, memos, presentations and reports
- Processing & filing mail
- Office management:  
Ordering supplies, keeping groceries in stock, maintaining project board, keeping an updated list of passwords and sensitive information, paying bills, etc...
- Assisting with projects and other duties as needed
- Some availability during non-working hours to assist on travel changes and other misc. urgent requests.
- Multi-line telephone support
- Managing technology for a non-tech savvy executive.
- Light personal assistant duties will also need to be performed such as making doctor appointments, arranging for pet sitter, running errands, etc...

## **JOB DESCRIPTION**

- Be prepared to figure out how to get things done.

### **Skills Required**

- Minimum 5 years in an administrative assistant role, preferable in corporate or law office setting; interaction with executive level professionals a plus
- Organized self-starter who can work independently with little direct supervision
- High attention to detail, very strong organizational skills, and ability to think outside the box
- Ability, flexibility and adaptability to manage multiple and ever-changing priorities, personalities and deadlines
- Strong customer service and people skills are required.
- Sound understanding of corporate office policies and procedures
- Ability to interact with employees and guests at all levels with confidence and professionalism
- Excellent written, oral and comprehension experience and associated skill sets
- Able to maintain a high level of tact, diplomacy and confidentiality
- Computer skills - must include advanced level proficiency in Microsoft Office products; Microsoft Word, Excel and Outlook and PowerPoint.
- Positive attitude extremely important...

### **Qualities/Attributes of Preferred Candidate:**

- Self Starter/Responsible/Work Independently
- Diplomatic/Tactful
- Inquisitive
- Assertive
- Non-judgmental
- Flexible
- Problem Solving and Analytical Ability
- Communication Skills

- Sociable
- Willing to hold employer accountable to their goals
- Tolerance for ambiguity
- Comfortable working in a growth environment

## **Experience**

We are less concerned with how many years of Legal Secretary/Executive Personal Assistant experience you have, than we are with how many experiences you have gained and mastered during those years.

## **Miscellaneous**

Problem solving, listening skills, alignment with core philosophy, detail oriented, systematic, creative, good-natured, emotionally-secure, patient, optimistic, flexible, knows when to lead and when to follow. These are all adjectives and terms that describe our ideal candidate.

If you're interested in applying, please send your resume to [secretary@smalllawfirmmanagement.com](mailto:secretary@smalllawfirmmanagement.com) with your name spelled backwards in the subject line. Also, take the time to read "A Message to Garcia" by Elbert Hubbard, and include in the body of your email a few sentences (no more than 1 paragraph) explaining why you think we asked you to read this upon applying for this position.

All resumes submitted which follow these instructions will be reviewed.

# Sample Quiz Questions For a Legal Secretary –

Instructions: You may take as much or as little time as you like to complete this ten-question-quiz. You may organize your answers in any way that makes the most sense to you. When you are finished with the quiz, please email your answers and your resume to [secretary@smalllawfirmmanagement.com](mailto:secretary@smalllawfirmmanagement.com).

Please be sure to write your first name spelled backwards in the subject line so we know you're really paying attention. You might be surprised to know that every time we do this almost half of the applicants still ignore these instructions. Hopefully you won't. Hickory Dickory dock, The mouse ran up the clock, The clock struck one, The mouse ran down, Hickory Dickory dock. You see, we can write anything here and half the applicants won't even see it because they don't read instructions. Oh, well.

When you are finished with the quiz, please email your answers as a Power Point Presentation and your resume to [secretary@smalllawfirmmanagement.com](mailto:secretary@smalllawfirmmanagement.com). We will notify you by email to schedule an interview or when the position is filled.

## Question 1:

Rather than telling us "how" for this exercise please set-up a free Blog for (your name spelled backwards) and link it to your Facebook account and Twitter. If you like you can make up a Facebook & Twitter account just for this purpose using your name spelled backwards as the ID. Please note we are not overly concerned with the design of the blog, etc. so don't knock yourself out on that aspect of this exercise.

## Question 2:

Please re-arrange the frames of this comic book page into order so the story makes sense:

Re-arrange the frames so the story makes sense

**A** THEN THE COLORS VANISHED AND THE SCREEN WAS A GLARING WHITE--WHEN WE SAW SOMETHING COME OUT OF IT--

**B** IT HEARD ME. IT MOVED LIKE GREASED LIGHTNING. IT LEAPED INTO THE BLAZING SCREEN, WITH ME, EDDIE MICHAELS, RIGHT ON ITS HEELS! COME BACK, YOU!

**C** THE RAIDS HADN'T NETTED THE THIEVES ANY BIG HALLS--IN FACT, THEY DIDN'T TAKE ANYTHING OF REAL VALUE. JUST ODD ITEMS LIKE A COMB, A CLOCK--THINGS LIKE THAT. THAT NIGHT, MAX AND I STAYED AWAKE AND ALERT--

**D** SUDDENLY IN THE DARKNESS, A STRANGE LIGHT BEGAN TO FLICKER. IT BECAME LARGER UNTIL IT TOOK ON THE PROPORTIONS OF A MOVIE SCREEN! THEN A KALEIDOSCOPE OF SHIFTING COLORS BEGAN TO MOVE ACROSS IT--

**E** OUR EYES POPPED LIKE SAUCERS AS THE THING BLENDED WITH THE SHADOWS--

**F** THAT GOT MY DANDER UP! I HEARD MAX YELL AS I LEAPED FOR THE INTRUDER--

**G** WE COULDN'T MAKE OUT WHAT IT WAS-- BUT WE COULD HEAR IT RUSTLING ABOUT-- IN FACT, IT WAS RUSTLING MAX'S CIGARETTE LIGHTER, HIS FOUNTAIN PEN AND MY NEW HAT!

## Question 3:

Please make up a short story about an ambitious entrepreneur who has to travel to twelve different cities in the span of three days to conduct ten different speeches while wearing a tu-tu.

**Question 4:**

Create a sample project plan, budget and checklist for hosting a trade show booth.

**Question 5:**

Document our company's procedure for booking travel & making all necessary arrangements for one of our executives to conduct a training meeting for a client, in the client's office, in a city one thousand miles away where we have never done business before. The training meeting will be 8:30am-5:30pm local time.

**Question 6:**

Background: Our company tends to offer similar advice to different clients experiencing similar fact patterns on a regular basis. Some of this advice is delivered in writing, by conference call, webinar or by making video recordings of live events. Our founder is disorganized and tends to have to recreate the same information over & over again. Furthermore, we have a million ideas & plans for projects to help the company and its clients grow. Some of these projects/plans/hopes/dreams are developed on the back of napkin and arrive in the office in exactly that state. Others are handwritten notes and sketches. And yet other projects are developed as far as being nearly ready to be implemented when and if the time is ever right. We also get a lot of email correspondence from vendors, potential joint venture partners, team members and clients too. We also draw a lot of ideas and inspiration from apparently random bits of this & that such as newspaper articles, advertisements in magazines and digital videos. In addition to all of this there is the usual array of personal and household paperwork plus expense reports, etc. that must be managed.

Propose a filing system will you use to manage all of the above and be sure it's all accessible anywhere you and/or the founder are working from.

Note: We have a professional grade copier/scanner in the office you will be able to use.

**Question 7:**

What are the three most interesting new things you have educated yourself about recently, outside of work? Why are these things so interesting to you? How did you educate yourself about these three subjects?

**Question 8:**

You have been asked to obtain a copy of a government document for the founder. You have been told by the person who answered the phone that the only possible way to obtain the needed document is for the founder to personally visit the government office in question. Your response is:

Report the facts, honestly and accurately to the founder and suggest a good book to read while waiting on line;

Report the facts to the founder and suggest a good magazine to read while waiting on line because you have at least taken the initiative to schedule an appointment;

Think to yourself "This is BULLSHIT!" and then proceed to work your way creatively up, over, around and through the chain of command until you figure out how to get the document without wasting the founder's time.

# BEST OF SESSION 2

	IDEA TO IMPLEMENT	BEST FIRST ACTION(S)
1	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
2	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
3	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
4	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
5	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
6	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	

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#



# NOTES

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# SESSION 3

1:20PM - 2:40 PM

**“** A leader is one who knows the way,  
goes the way, and shows the way. **”**

- John C. Maxwell

# DELEGATE:

**“Entrust (a task or responsibility) to another person, typically one who is less senior than oneself.”**

(Google Search)

**“To commit (powers, functions, etc.) to another as agent or deputy.”**

(Dictionary.com)

**“To give (control, responsibility, authority, etc.) to someone : to trust someone with (a job, duty, etc.)”**

**“To choose (someone) to do something”**

(Websters Dictionary)

**“The entrusting another with a general power to act for the good of those who depute him. At common law. The transfer of authority by one person to another”**

(Black’s Law Dictionary)

**//** Delegation isn't shoving a task down to someone, it's building the person up to the task at hand. **//**

**- RJON ROBINS**

# DELEGATION WORKSHEET

[illegible]

Part of the strategy in delegation is delegating low-risk tasks first, so that people can earn your trust, and then you can gradually promote them to high-risk task.

**GET BETTER OR  
GET OUT**

**//** A rolling stone gathers no moss. **//**



Photo credit: Washington State Dept of Transportation on flickr.com/

Jobs in Firm	How have I gotten better in the last quarter?
Receptionist	
Secretary	
Paralegal	
Associate	
Rainmaker	
Manager/ Administrator	
COO	
CFO	
Owner	
CEO/Founder/ You	
Investor/ Stakeholder	

# RESOURCES FOR BUILDING YOUR TEAM

Adult Education

Online classes

home study

exercises

books

audio programs

mock work assignments

seminars

workshops

peer to peer training



# **SKILLS REVIEW**

## **I. The Quarter in Review.**

A. Attendance.

B. Policies and Procedures  
(contribution and compliance).

C. Skills and Training Goals

D. Billable/Productive Time Review

## **II. The Next 90 Days.**

A. Attendance/ Vacation.

B. Policies and Procedure Goals.

C. Skills and Training Goals.

D. Billable Time Goals.

## **III. Other Discussions.**

# LIST YOUR PEOPLE

Next to each person, how did this person get closer to achieving his/her goals as a result of working with your organization?

NAME	HOW?
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. _____	_____

# INDIVIDUAL CURRICULUM (1)

Name \_\_\_\_\_ Age \_\_\_\_\_

Relationship Status \_\_\_\_\_

Ages of Children: \_\_\_\_\_

Significant Other Occupation: \_\_\_\_\_ Significant-other's Income: \_\_\_\_\_

Current Income: \_\_\_\_\_ Home: \_\_\_\_\_ Car: \_\_\_\_\_

Education: \_\_\_\_\_ Professional Credentials: \_\_\_\_\_

Insurance: \_\_\_\_\_ Domestic Help: \_\_\_\_\_

Vacations: \_\_\_\_\_ Philanthropic: \_\_\_\_\_

Special needs: \_\_\_\_\_ Savings: \_\_\_\_\_

Entertainment: \_\_\_\_\_ Other: \_\_\_\_\_

Other: \_\_\_\_\_ Other: \_\_\_\_\_

NOW	GOAL	ACTION ITEMS
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
6. _____	6. _____	6. _____
7. _____	7. _____	7. _____
8. _____	8. _____	8. _____
9. _____	9. _____	9. _____
10. _____	10. _____	10. _____

# INDIVIDUAL CURRICULUM (2)

Name \_\_\_\_\_ Age \_\_\_\_\_

Relationship Status \_\_\_\_\_

Ages of Children: \_\_\_\_\_

Significant Other Occupation: \_\_\_\_\_ Significant-other's Income: \_\_\_\_\_

Current Income: \_\_\_\_\_ Home: \_\_\_\_\_ Car: \_\_\_\_\_

Education: \_\_\_\_\_ Professional Credentials: \_\_\_\_\_

Insurance: \_\_\_\_\_ Domestic Help: \_\_\_\_\_

Vacations: \_\_\_\_\_ Philanthropic: \_\_\_\_\_

Special needs: \_\_\_\_\_ Savings: \_\_\_\_\_

Entertainment: \_\_\_\_\_ Other: \_\_\_\_\_

Other: \_\_\_\_\_ Other: \_\_\_\_\_

NOW	GOAL	ACTION ITEMS
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
6. _____	6. _____	6. _____
7. _____	7. _____	7. _____
8. _____	8. _____	8. _____
9. _____	9. _____	9. _____
10. _____	10. _____	10. _____

# INDIVIDUAL CURRICULUM (3)

Name \_\_\_\_\_ Age \_\_\_\_\_

Relationship Status \_\_\_\_\_

Ages of Children: \_\_\_\_\_

Significant Other Occupation: \_\_\_\_\_ Significant-other's Income: \_\_\_\_\_

Current Income: \_\_\_\_\_ Home: \_\_\_\_\_ Car: \_\_\_\_\_

Education: \_\_\_\_\_ Professional Credentials: \_\_\_\_\_

Insurance: \_\_\_\_\_ Domestic Help: \_\_\_\_\_

Vacations: \_\_\_\_\_ Philanthropic: \_\_\_\_\_

Special needs: \_\_\_\_\_ Savings: \_\_\_\_\_

Entertainment: \_\_\_\_\_ Other: \_\_\_\_\_

Other: \_\_\_\_\_ Other: \_\_\_\_\_

NOW	GOAL	ACTION ITEMS
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
6. _____	6. _____	6. _____
7. _____	7. _____	7. _____
8. _____	8. _____	8. _____
9. _____	9. _____	9. _____
10. _____	10. _____	10. _____

# BEST OF SESSION 3

	IDEA TO IMPLEMENT	BEST FIRST ACTION(S)
1	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
2	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
3	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
4	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
5	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
6	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	

Which idea on this page, *if implemented*, would have the biggest positive impact on your business and/or life?

#

# NOTES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# SESSION 4

3:00 - 4:00 PM

**//** The best teamwork comes from men  
who are working independently toward one  
goal in unison. **//**

- James Cash Penney



# BEST OF SESSION 4

	IDEA TO IMPLEMENT	BEST FIRST ACTION(S)
1	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
2	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
3	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
4	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
5	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
6	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	

Which idea on this page, *if implemented*, would have the biggest positive impact on your business and/or life?

#

# NOTES

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# SESSION 5

4:30 - 5:50PM

“ Be a yard stick of quality. Some people aren't used to an environment where excellence is expected. ”

- Steve Jobs

# October 2014

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			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	

*New York Times* BESTSELLING AUTHOR

JOHN C.  
MAXWELL

— THE —

5

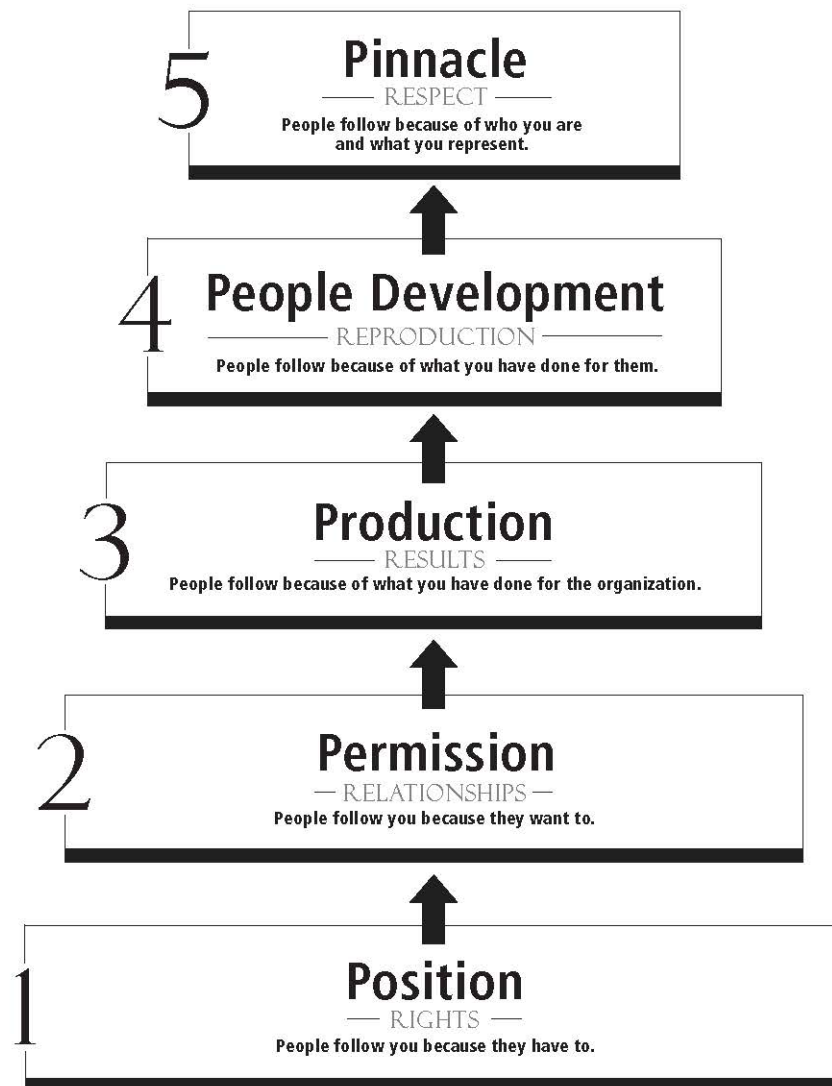
LEVELS

— OF —

LEADERSHIP

PROVEN STEPS TO MAXIMIZE YOUR POTENTIAL

## Overview of the 5 Levels of Leadership



---

# Leadership Assessment

---

## *How to Gauge Your Current Level of Leadership*

**T**his is a four-part questionnaire to help you understand where you are in the leadership journey related to the 5 Levels. I want to encourage you to stop moving forward in the book and immediately spend the time required to assess your current level. Completing parts 1 and 2 should not require a large investment of your time. Part 3 may take a bit longer, since it involves other people, but please get that started, too. Its main purpose is to verify whether your instincts and self-perception are correct in Part 2. Part 4 will give you insight into where you stand overall with your team and should be done after you've completed parts 1, 2, and 3.

If you do this groundwork, you will be in a much better position to grow in your leadership as you read and work through the remainder of the book.

## Part 1 — Leadership Level Characteristics

**T**his first section applies to your leadership in general. Please read the following ten statements. Place a check mark next to each one that you agree is true for you. Answer using your first instinct. Please do not skip any questions, and do not go back and change any of your responses.

### Level 1

- ☐ I don't have to remind the people who work for me that I am the leader.
- ☐ I think of each person who works for me as an individual person, not just in terms of his or her function or role.
- ☐ Most days I look forward to going to work.
- ☐ I recognize that the position I've been given is an opportunity to learn, not turf to be guarded.
- ☐ The people who work for me are willing to do work above and beyond their job descriptions.
- ☐ I know that dealing with people problems is a part of leading and have accepted that as part of the job.
- ☐ I possess the desire to learn more about leadership and become a better leader.
- ☐ I think of my job in terms of work to be accomplished and give very little focus to career path and the positions I desire to achieve along the way.
- ☐ One of my primary objectives is to assist the people who work for me.
- ☐ Most people find it easy to work with me.



## LEADERSHIP ASSESSMENT

If you marked eight or more of the previous statements as true for you, then you have probably already established yourself as a leader on Level 1 and have begun to move to the higher levels. Move on to the next section of the test. However, if you checked fewer than eight, then you have probably not yet mastered Level 1, and this is where you will probably begin your work in personal leadership development. Why? Because you are only as good as the lowest level you've mastered.

### Level 2

- ☐ People outside of my department or area of responsibility respect my opinions and frequently seek me out for advice.
- ☐ I know my strengths and weaknesses and rarely get blindsided in my work.
- ☐ I genuinely like most people and want to help them.
- ☐ I am very consistent and even-tempered in my interaction with the people who work for me.
- ☐ When I say something to the people on my team, they always know they can count on it because I am trustworthy.
- ☐ I have developed solid relationships with all of the people who work for me.
- ☐ The people who work with me find me likable and pleasant nearly 100 percent of the time.
- ☐ When I need to have a candid conversation with team members to correct errors or take care of problems, I follow through and don't allow too much time to go by.
- ☐ I believe that employees desire more than just a fair day's pay for a fair day's work; most desire encouragement and I give it to them.
- ☐ I have developed relationships with everyone who works for me.

If you marked eight or more of the above statements as true for you, then move on to the next section. If not, you may want to save the

## THE 5 LEVELS OF LEADERSHIP

rest of Part 1 of the test for later because your answers indicate that you've not yet mastered Level 2 and you don't yet think like a Level 2 leader. If you do decide to complete Part 1 at this time, please be aware that even if you mark eight or more statements true in subsequent sections, you cannot be on the higher levels of leadership because you have not yet won Level 2. This also applies as you answer the questions in subsequent levels.

### Level 3

- ☐ I consistently hit targets and goals in my work.
- ☐ Good people always want to work with me and my team.
- ☐ People see me as an expert in my field and seek me out to learn from me.
- ☐ I am constantly setting and achieving higher goals for myself, even when my superiors don't set them for me.
- ☐ My performance in my work often carries the team to a higher level.
- ☐ I give my best to whatever I do.
- ☐ I am comfortable with the idea that others are watching how I perform and follow my example.
- ☐ I am known as a problem solver, and I often get difficult tasks done.
- ☐ My work is very consistent on a daily basis.
- ☐ I have systems and routines that help me perform at a very high level.

If you marked eight or more of the above statements as true for you, then move on to the next section. If not, your answers indicate that you've not yet mastered Level 3 and you don't yet think like a Level 3 leader.

## LEADERSHIP ASSESSMENT

### Level 4

- ☐ I schedule and follow through with training and development for all the members of my team on a regular, consistent basis.
- ☐ When deadlines loom or work becomes urgent, we never cancel our training and development sessions.
- ☐ I consistently take risks by giving people responsibilities and authority that will stretch them.
- ☐ I spend a significant amount of time every month mentoring up-and-coming leaders.
- ☐ I know very thoroughly the strengths and weaknesses of all the people I lead.
- ☐ I individualize the way I train, develop, and mentor my people.
- ☐ I spend the most strategic and significant mentoring time with the people who have the highest capacity, talent, and potential.
- ☐ I have a history of moving people from position to position to help find their fit.
- ☐ I am continually giving people feedback, not just during formal reviews.
- ☐ My team or department is considered by others to be the best trained (or one of the best) in the organization.

If you marked eight or more of the above statements as true for you, then move on to the next section. If not, your answers indicate that you've not yet mastered Level 4 and you don't yet think like a Level 4 leader.

### Level 5

- ☐ I can name several specific people whom I have encouraged to speak hard truths to me, and they do so regularly.
- ☐ I am using my influence to instill values in my organization.

#### THE 5 LEVELS OF LEADERSHIP

- ☐ The course of my organization is set by me or by a team of which I am a part.
- ☐ I have developed many leaders who are developers of leaders.
- ☐ I enjoy the interaction and friendship of a small circle of leaders with whom I am taking the leadership journey.
- ☐ I am still at the top of my game, and the positive impact I am making is strong.
- ☐ I can name at least one person who would be ready to step in and take my place should I decide to leave my current position.
- ☐ I have influence outside of my organization.
- ☐ People from outside of my specific industry seek me out for leadership advice.
- ☐ I am using my influence and resources for causes greater than myself or my organization.

In leadership, you are only as good as the lowest level you've mastered. So I just want to remind you that even if you scored highly in one of the higher levels, if you scored poorly on a lower level, your leadership is actually on that lower level. That is where you will need to give your attention when working with people to improve your leadership ability.

## **Part 2 — Individual Team Member Assessment — Leader's Point of View**

**F**or each person you oversee directly (direct reports), please answer yes or no to the questions on the following worksheet. (Be sure to complete Part 2 before moving on to Part 3.)

## INDIVIDUAL TEAM MEMBER ASSESSMENT

Name of Team Member:

Date:

---

### Level 1

- |     |    |  |
|-----|----|--|
| Yes | No | This person acknowledges you as his or her leader.   |
| Yes | No | This person would agree that you are suited for the leadership position you hold.  |
| Yes | No | This person would acknowledge that you see your position as an opportunity to earn your place at the leadership table, not as a privilege to be used for personal advancement. |

### Level 2

- |     |    |  |
|-----|----|--|
| Yes | No | You know things about this person's family and personal life outside of his or her work. |
| Yes | No | You know this person's strengths and weaknesses.   |
| Yes | No | You know this person's hopes and dreams.   |
| Yes | No | You are committed to helping this person succeed in his or her work.                     |
| Yes | No | This person trusts you and you trust him or her.   |

### Level 3

- |     |    |   |
|-----|----|---|
| Yes | No | This person respects your professional ability and qualities.                                     |
| Yes | No | This person asks for your advice and expertise.   |
| Yes | No | This person has become more productive because of your influence.                                 |
| Yes | No | This person would acknowledge that the team is more productive because of your leadership.        |
| Yes | No | This person would agree that your team contributes to the vision and purpose of the organization. |

## INDIVIDUAL TEAM MEMBER ASSESSMENT (*continued*)

### Level 4

- |     |    |  |
|-----|----|--|
| Yes | No | You have given this person specific training that has helped him or her to perform better.                                     |
| Yes | No | You have mentored this person or put him or her in a development process that has helped him or her to become a better leader. |
| Yes | No | This person is now leading others because you have given opportunities and training for him or her to lead.                    |
| Yes | No | This person is consistently loyal and supportive, and always gives you the benefit of the doubt.                               |

### Level 5

- |     |    |   |
|-----|----|---|
| Yes | No | This person is not only leading others but has trained those he or she leads to develop leaders thanks to your input.         |
| Yes | No | This person could step into your role with a very high probability of success if you were to step down.                       |
| Yes | No | This person is your advocate and champions you with other leaders so that you gain others' respect even before you meet them. |



## THE 5 LEVELS OF LEADERSHIP

### EVALUATION

You can learn two things from this assessment: First, you can understand where you are with each person on the 5 Levels of Leadership based on your answers. If you answered *no* more times than *yes* in a section, then you have not gotten to that level with that person. (Instead, you would be on the level below that one.)

The second thing you can learn is where you need to work to improve. A *no* answer to any statement indicates where you need to do some work.



## **Part 3—Leadership Assessment— Team Member's Point of View**

**A**sk each of the people who report directly to you to fill out the following worksheet for you. They may do so anonymously if they wish. Use the same criteria for evaluating this assessment as you used to evaluate the Part 2 assessment you completed.

Note that even if you are a very good leader, you may have an employee or volunteer who refuses to put you anywhere but Level 1. You can try to win over that person on Level 2 and then progress, but there are no guarantees that the person will allow him- or herself to be won over.

## LEADERSHIP ASSESSMENT

**Name of Leader:**

**Date:**

---

Please read each statement and respond with yes or no in reference to the leader whose name is listed above. There are no right or wrong answers. This assessment is designed only to describe your interaction with the person. (If you wish, you may answer this assessment anonymously.)

### Level 1

- |     |    |   |
|-----|----|---|
| Yes | No | You acknowledge this person as your leader.   |
| Yes | No | This person is well-suited for the leadership position he or she holds.   |
| Yes | No | This person treats the leadership position as an opportunity to earn a place at the leadership table, not as a privilege to be used for personal advancement. |

### Level 2

- |     |    |  |
|-----|----|--|
| Yes | No | This leader cares about your family and personal life outside of work and regularly asks you questions about them. |
| Yes | No | This leader knows your strengths and weaknesses.   |
| Yes | No | This leader knows and respects your hopes and dreams.  |
| Yes | No | This leader is committed to helping you succeed in your work.  |
| Yes | No | You trust this leader and he or she trusts you.  |

### Level 3

- |     |    |   |
|-----|----|---|
| Yes | No | You respect this leader's professional ability and qualities. |
| Yes | No | You rely on his or her advice and expertise.                  |

## LEADERSHIP ASSESSMENT *(continued)*

- |     |    |  |
|-----|----|--|
| Yes | No | You have become more productive because of this leader's influence.                        |
| Yes | No | The team you are part of is more productive because of his or her leadership.              |
| Yes | No | You and the team you are part of contribute to the vision and purpose of the organization. |

### **Level 4**

- |     |    |   |
|-----|----|---|
| Yes | No | You have received specific training from this leader that has helped you to perform better.             |
| Yes | No | This leader has mentored or developed you to help you become a better leader.                           |
| Yes | No | You are currently leading others as a result of opportunities and training given to you by this leader. |
| Yes | No | You believe in this leader and automatically give him or her the benefit of the doubt.                  |

### **Level 5**

- |     |    |  |
|-----|----|--|
| Yes | No | You are training and developing other leaders thanks to the input from and influence of this leader.                               |
| Yes | No | You could step into your leader's role with a very high probability of success because he or she has helped to prepare you for it. |
| Yes | No | This leader has changed your life, and you are an advocate who champions him or her with other leaders.                            |

Once you have completed the assessment, please return this document to the leader listed at the top of the page.

## Part 4—Current Leadership Level Assessment

	Part 1 # True	Part 2 # On Each Level	Part 3 # On Each Level	Predominant Level
Level 1				
Level 2				
Level 3				
Level 4				
Level 5				

You can gain a “snapshot” of your leadership by doing the following:

1. In the column labeled Part 1, record the number of statements you agreed with as true in each section of the assessment.
2. In the column labeled Part 2, record the number of your team members who are on each level with you based on your assessment of them.
3. In the column labeled Part 3, record the number of people who put you on each level according to their answers to the statements.
4. Now add the lines across. Which level of leadership has the highest number? More than likely, the one with the highest number indicates your current level of leadership with the majority of

## LEADERSHIP ASSESSMENT

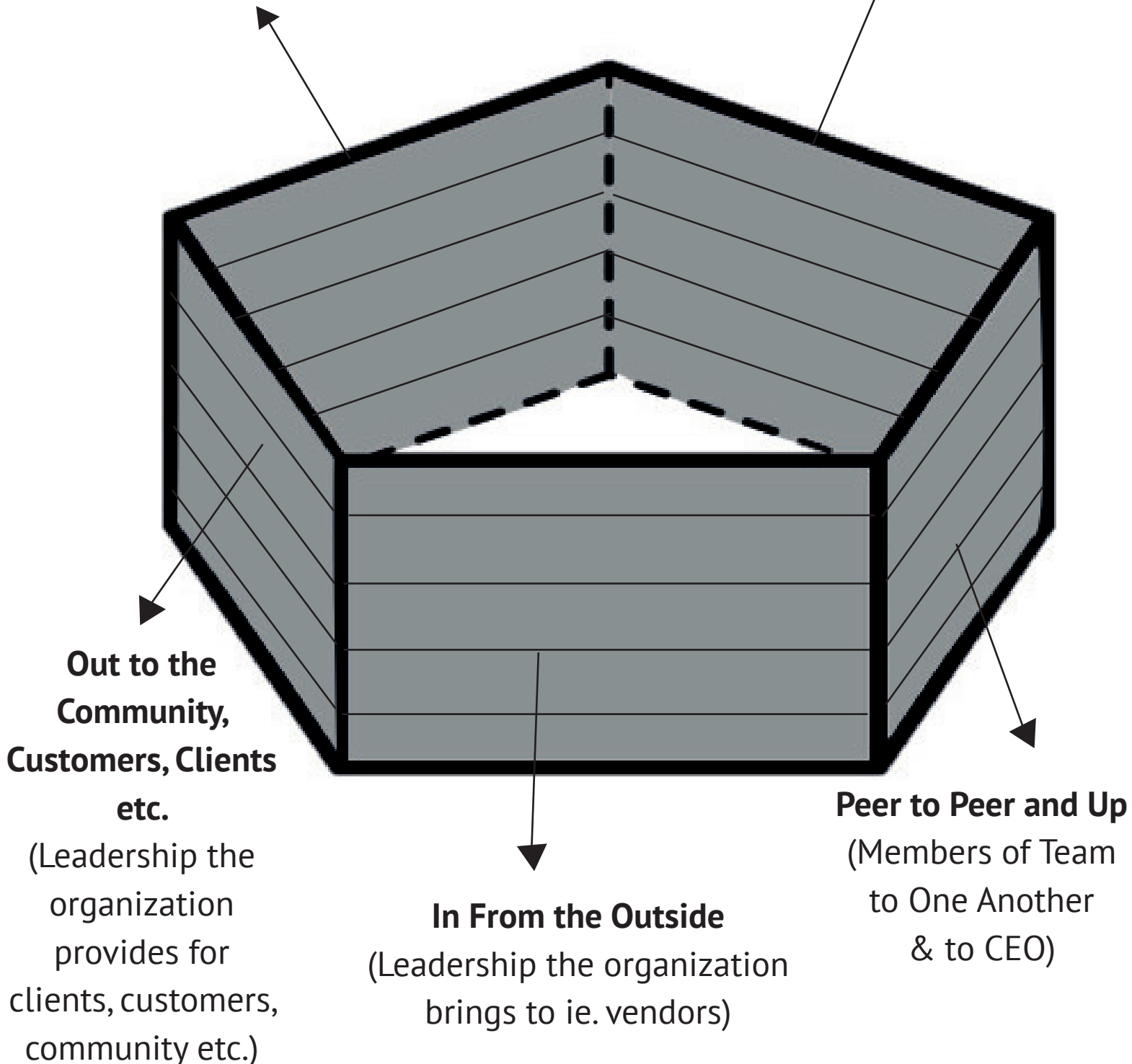
people on your team. (This isn't meant to be scientifically valid. It's simply a tool to give you insight into yourself.)

Keep this assessment in mind as you move through the book. The Guide for Growth at the end of each section of the book will help you to improve your leadership skills and move up to the higher levels of leadership with your people.

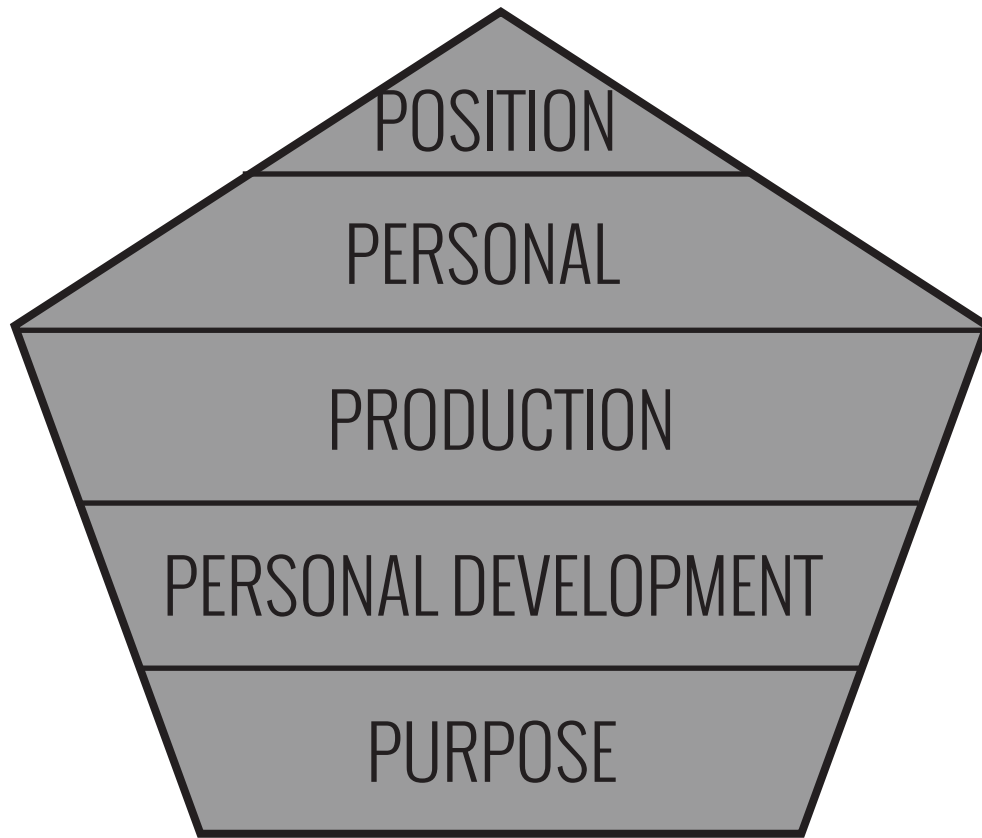
## Back

from Customers) (Leadership your A Clients give back to your org... This is a big reason why they are called A Clients)

**Top Down**  
(CEO to Team)



# TOP DOWN



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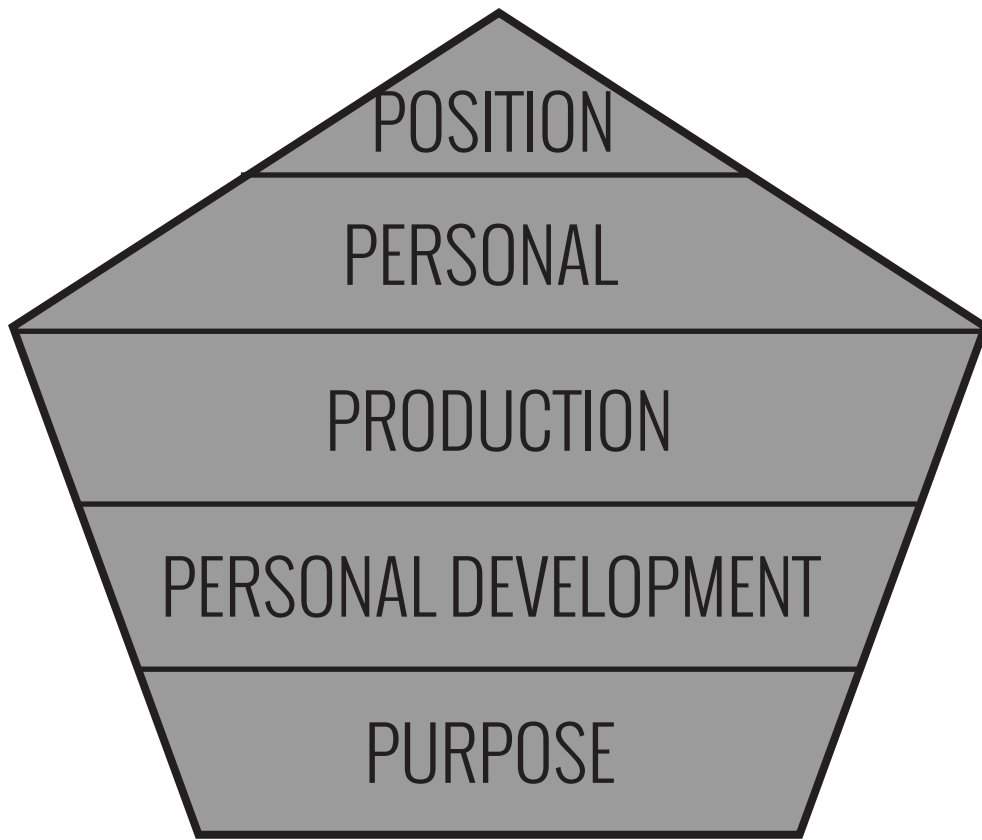
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# PEER TO PEER AND UP



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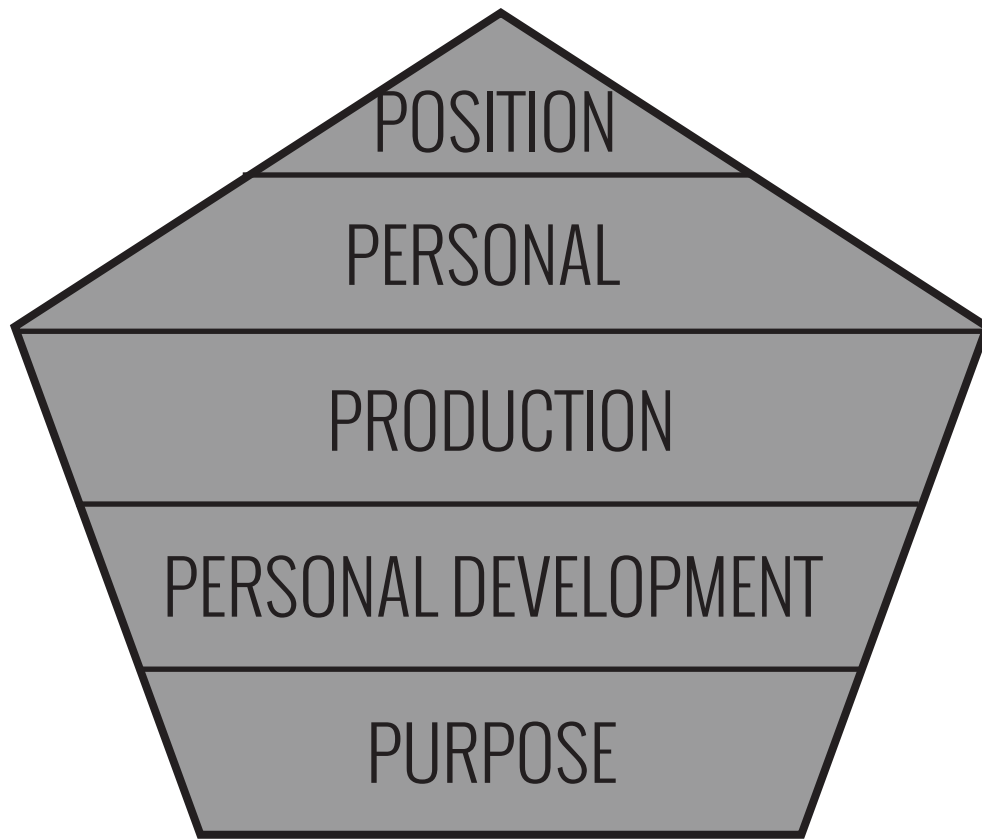
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# IN FROM THE OUTSIDE



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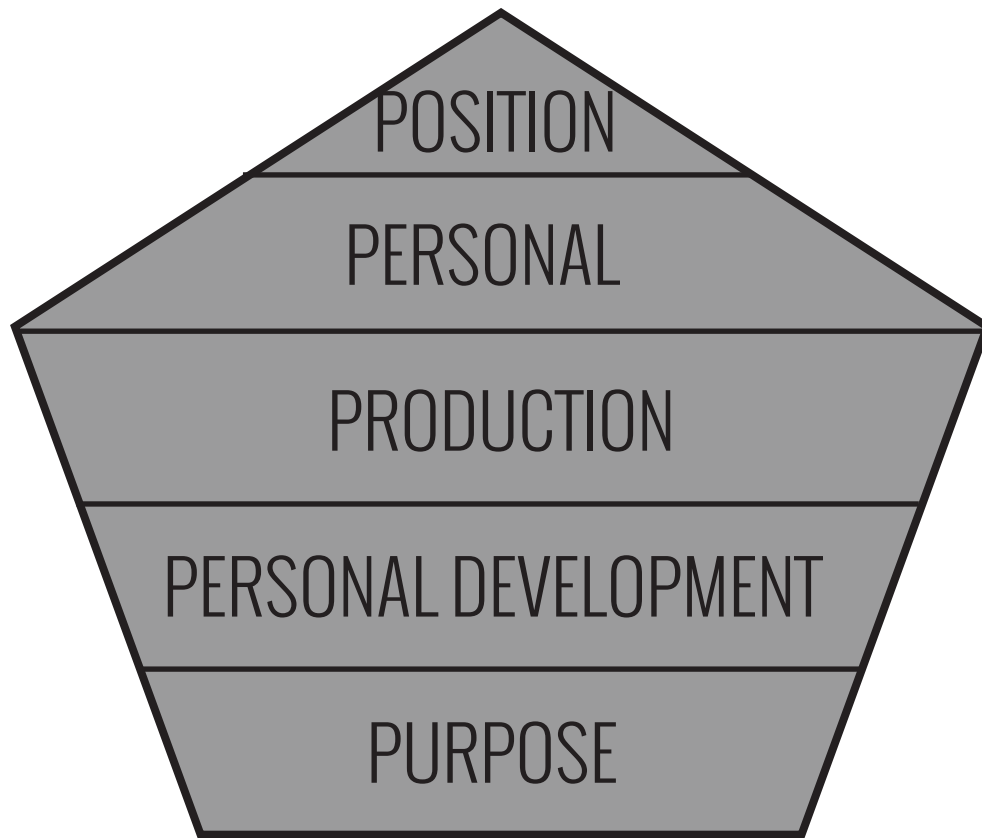
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# OUT TO YOUR COMMUNITY, CLIENTS & CUSTOMERS



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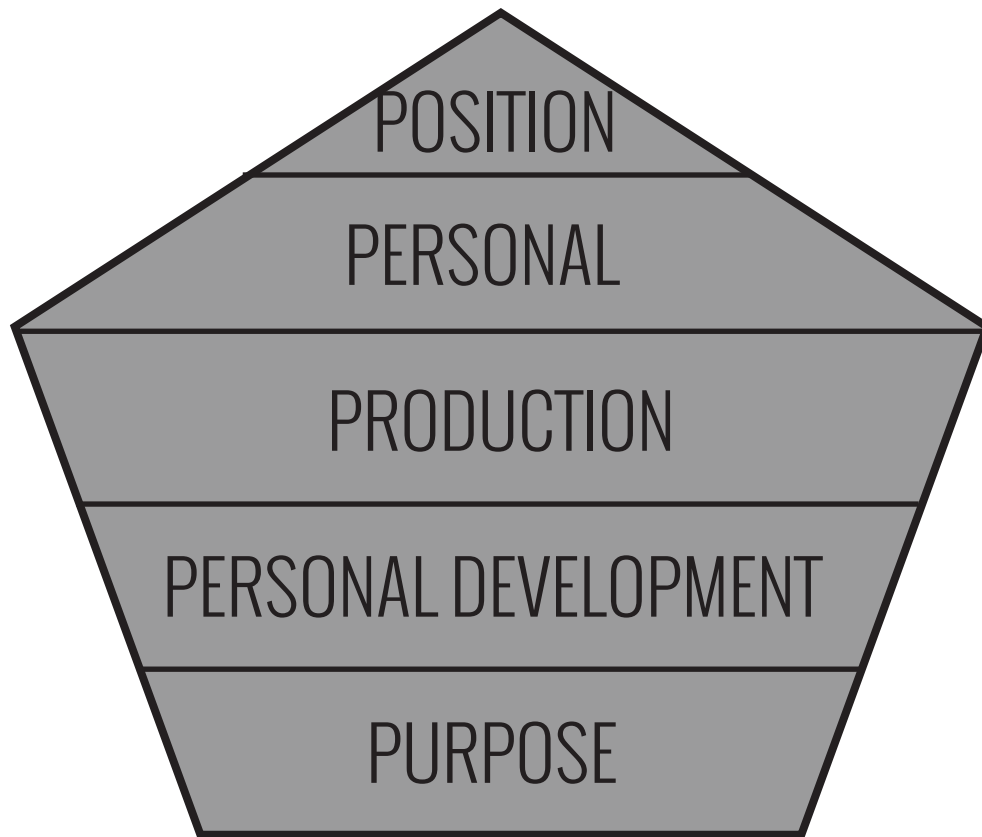
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# BACK



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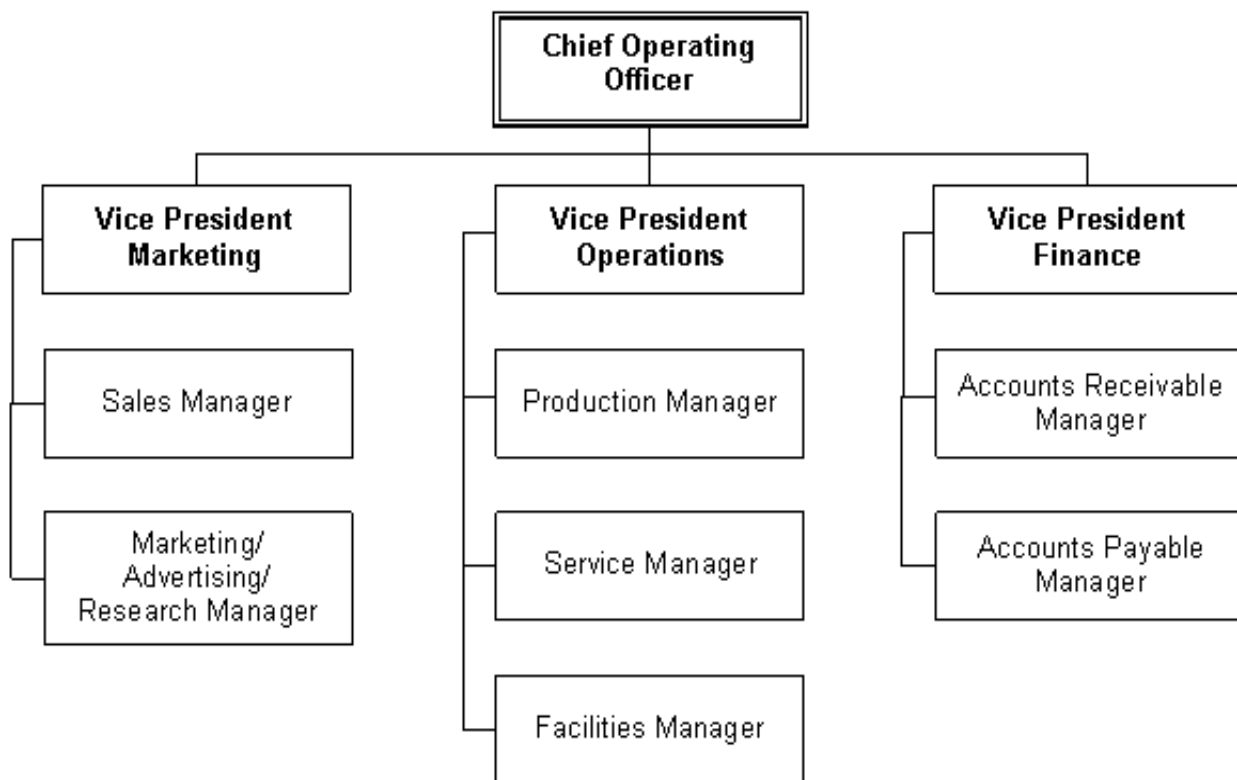
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# SCOPE OF LEADERSHIP



## This image shows a full page of blank graph paper. The grid consists of small, equal-sized squares formed by thin black lines. There are 20 columns and 20 rows of squares, creating a total of 400 square units. The grid covers the entire area of the page, leaving no margins or additional markings.

# SESSION 6

6:10 - 7:00PM

**“** Outstanding leaders go out of their way to boost the self-esteem of their personnel. If people believe in themselves, it's amazing what they can accomplish. **”**

**- Sam Walton**

# BEST OF SESSION 6

IDEA TO IMPLEMENT		BEST FIRST ACTION(S)
1	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
2	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
3	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
4	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
5	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
6	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	

Which idea on this page, *if implemented*, would have the biggest positive impact on your business and/or life?

#

# NOTES

[illegible]



# SESSION 7

9:00 - 10:30AM

**“** When your values are clear to you,  
making decisions becomes easier. **”**

- Roy E. Disney

# BEST OF SESSION 7

	IDEA TO IMPLEMENT	BEST FIRST ACTION(S)
1	<div><input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL</div>	
2	<div><input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL</div>	
3	<div><input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL</div>	
4	<div><input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL</div>	
5	<div><input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL</div>	
6	<div><input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL</div>	

Which idea on this page, *if implemented*, would have the biggest positive impact on your business and/or life?

#

# NOTES

This image shows a full page of blank white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page, providing a template for writing or drawing. There are no margins, text, or other markings present.



# SESSION 8

10:50AM-12:00PM

**//** Management is doing things right;  
leadership is doing the right things. **//**

- Peter Drucker

# THE 90-DAY RESULTS ACCELERATION

MY BEST R.O.I. 90 DAY \_\_\_\_\_ PROJECT:

## STEP 1

How is accomplishing this going to make your life better?  
Personally, Professionally or Financially

A

B

C

## STEP 3

What are the first 3 things that MUST get done in order to accomplish your objective?

1

2

3

## STEP 4

What TOOLS, RESOURCES or other ASSISTANCE do you need to get these done?

TOOLS	
RESOURCES <small>(PEOPLE, MONEY, TIME)</small>	
OTHER	

## STEP 2

How are you going to feel about yourself if you let something, someone, some fear or [enter excuse here] \_\_\_\_\_ stop you from getting this done?






## STEP 5

In what way(s) do you have to change your ENVIRONMENT in order to get this done?

PEOPLE	
PLACE	
THINGS	
READ/WATCH/LISTEN	
OTHER	

# BEST OF THE BEST

	IDEA TO IMPLEMENT	BEST FIRST ACTION(S)
1	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
2	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
3	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
4	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
5	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	
6	<input type="checkbox"/> PERSONAL <input type="checkbox"/> PROFESSIONAL <input type="checkbox"/> FINANCIAL	

Which idea on this page, *if implemented*, would have the biggest positive impact on your business and/or life?

#



## This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

# THE 90-DAY RESULTS ACCELERATOR™

— HOW TO —  
**MANAGE**  
A SMALL LAW FIRM  
HAPPY LAWYERS MAKE MORE MONEY

NAME:

ADVISOR:

## MY 90 DAY CALENDAR

Identify and commit to 2 types of activities

1. **FREE TIME** away from the office and work.
2. **Strategic Growth Time** away from the office

<b>MY BEST FREE TIME ACTIVITIES</b>	

<b>MY BEST STRATEGIC GROWTH ACTIVITIES</b>	

2014 NOVEMBER						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
						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						

2014 DECEMBER						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	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			

2015 JANUARY						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				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

2015 FEBRUARY						
SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
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