

# *The Organizational Tune-Up*



**Hello**  
my name is

BUSY

***Tips, Tools,  
Techniques***

# **Monthly Business Plan Review**

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***How did we do last month?***

***How are we doing year-to-date?***

***What changes in our plan are needed?***

***What are our commitments for next month?***

# **Success Description**

# ***Success Description***

**Goals**

**Strategy for Success**

**Metrics**

# **Behavioral Guidelines**



# ***Behavioral Guidelines***

**Internal Policies or  
Guidelines**

# **Weekly Planning**

# ***Weekly Planning***

**Organizing the Coming  
Week Before it Starts**

# **Workday Bookends**

# **Workday Bookends**

Morning Start-Up

[Ready for the Day]

Daily Wrap-Up

[Closure on the Day]

# Master Task List

# ***Master Task List***

**Chronological Listing of All  
Tasks, Commitments, and  
Priorities**

**Priority Work Time**

***[PWT]***



# **Priority Work Time**

**1-2 Hours of Daily  
Privacy to Work on  
Priorities**

# **Diagnosed Interruption**

# **Diagnosed Interruptions**

**Is This Really Important  
Right Now?**

# **Acutely Clear Delegation**

# ***Acutely Clear Delegation***

**Specifically...**

**What? When?**

# **One-to-One Briefings**

# **One-to-One Briefings**

Updates

Issues

Delegation

Other Items

# **Group Meeting Protocol**



# *Group Meeting Protocol*

Organized Agendas

Start/Stop On-Time

Active Participation

Excellent Note-Taking

Meeting Wrap-Up

# **Active-Only Email System**

# *Active Only Emails*

**Needing a Response**

[Inbox]

**Waiting for a Response**

[Sent Items]

**Unclutter  
Everywhere**

# **Unclutter Everywhere**

Purge

File

Shred

Recycle

Donate

# **Key Ideas & Commitments**

***What's the most significant thing  
you heard today?***

***What's your impactful  
30-day commitment?***





# CLOSING REMARKS



***Jim Collins***

***Good to Great***

***“Good is the enemy of great”***

# **Jim Collins**

***The vast majority of companies never become great  
because the vast majority become quite good - and  
that is their main problem.***

***The Good to Great Gap***

# *Closing the Gap*



***Competent***

***Motivated***

***Organized***

# **Old Proverb**

***The Way to do Many  
Things is to do One  
Thing at a Time***

**Good Luck!**

**Thank you...**