

# **Table of Contents**

## **Time Management & Productivity**

(Note: In the E-Book version, click on the title to jump to an individual form.)

### **SECTION 12.00: Planning Forms**

- 12.00 Time Management and Productivity Plan**
- 12.01 Mission Statement - Blank**
- 12.01A Sample Mission Statement**
- 12.01B Goal Grid**
- 12.01C Goal Grid Sample**
- 12.02 1-Year Goals and Initiatives**
- 12.03 5-Year Goals and Initiatives**
- 12.04 10-Year Goals and Initiatives**
- 12.05 Tolerations**

### **SECTION 13.00: Scheduling Tools**

- 13.01 Sample Time Template**
- 13.01A Weekly Time Template - Half Day**
- 13.02 Time Template Worksheet**
- 13.03 Time Template Meeting Agenda**
- 13.04 Managing Interruptions Script**
- 13.05 Phone Appointment Script**
- 13.06 Weekly Planning Form**
- 13.07 Daily To-Do List**
- 13.08 Power Hour Production Sign**
- 13.09 Production Time Sign**
- 13.10 15-Minute Project Update Form**

## **SECTION 14.00: Managing Interruptions**

- 14.00 Law Office Interruption Log**
- 14.01A Interruption Analysis Sheet**
- 14.02 Question Batching Form**
- 14.03 General Meeting Checklist**
- 14.04 General Meeting Agenda**
- 14.05 Partners Meeting Agenda**

## **SECTION 15.00: Performance Tracking Forms**

- 15.00 S.M.A.R.T Rules for Delegation**
- 15.01 Delegation Form**
- 15.01A A Request For Assistance**
- 15.02 Case Status Organizer**
- 15.02A A Case File To-Do List**

## **EXTRA FORMS**

- Weekly Planning Forms**
- Daily To-Do List**
- Question Batching Forms**

# How to Use The E-Book Version of This Book

This digital copy of your Advanced Implementation System includes Smart Forms with fillable fields (any form with a highlighted field), clickable links to audio files, articles and forms.

By clicking the audio icon you will be able to access recorded telephone conferences from both our Rainmakers Program and Graduate Network. (FYI : Any forms referred to in these programs are already included in this system.)

Be sure to look for these icons. Each will direct you to a relevant file download:



Articles



Audio



Forms

# Time Management and Productivity Plan

FORM 12.00

## Goal Setting/Planning:

- Create Mission Statement
- Goals
  - Establish 1-Year Goals (Form 12.02)
  - Establish 5-Year Goals (Form 12.03)
  - Establish 10-Year Goals (Form 12.04)
  - Establish an Exit Strategy
- Identify/Eliminate Tolerations (Form 12.05)

## Personal/Family Time:

- Personal Time
- Family Time
  - Family Meetings/Game night
- Spirituality/Self-Development
- Health/Fitness/Personal Well-being
- Attending to Finances

## Scheduling:

- Time Template in place, create time blocks for:
  - Monday (Weekly) Planning Session (Form 13.06)
  - Priority Production
  - Return Messages (phone, fax, email, voice mail, etc.)
  - Client Appointments
  - Marketing Events
  - Managing/Supervising Cases
  - Administration
  - Atticus Homework/Calls with Practice Advisor

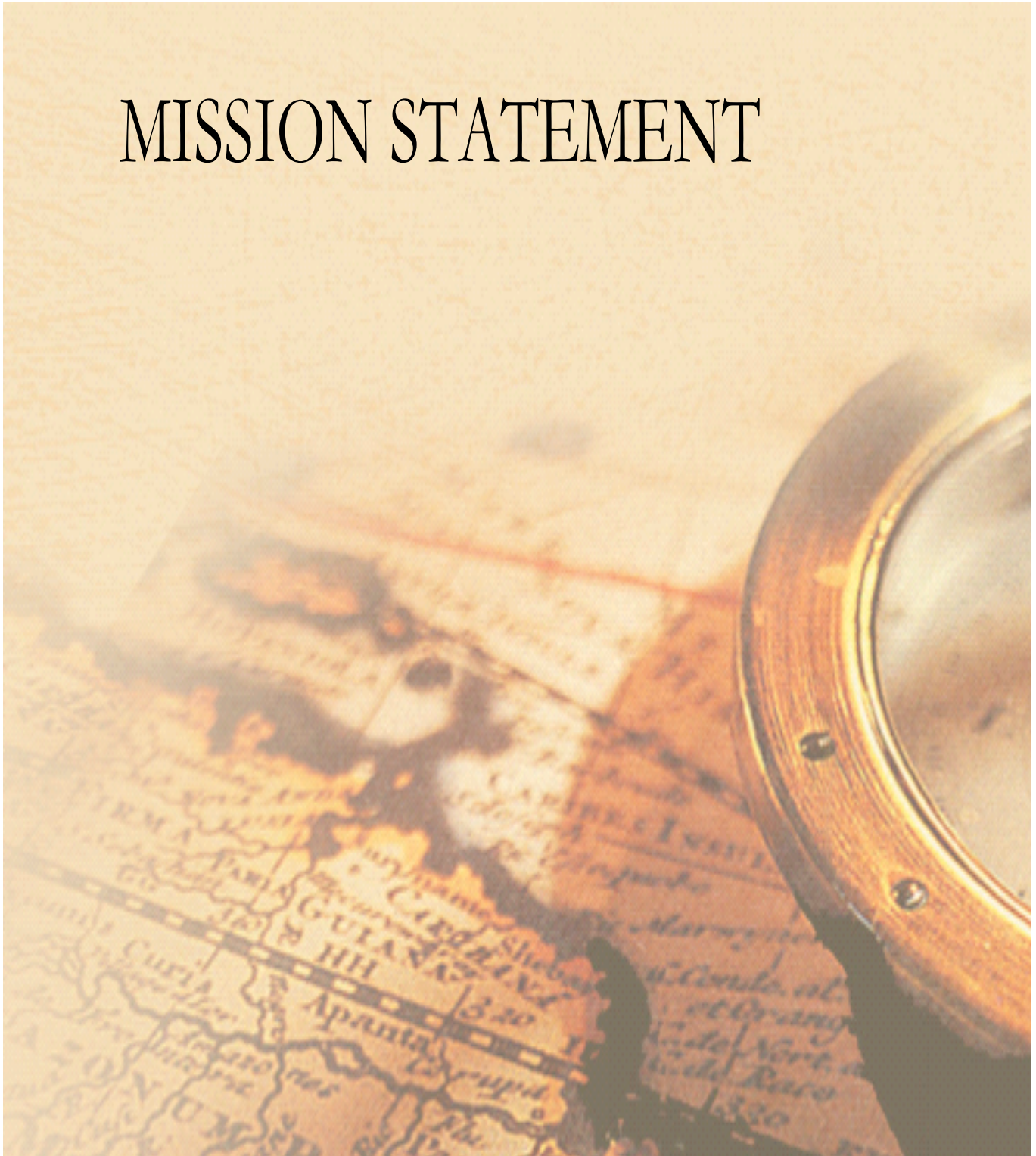
## Managing Interruptions:

- Have Time Template Meeting with staff to gain their support (Use Forms 13.01, 13.02, 13.03, 13.04)
- Have staff use phone appointments script (Form 13.05)
- Establish Interruption Criteria (Including use of door signs: Forms 13.08, 13.09)
- Staff to Batch Questions (Form 14.02)
- Track Interruptions with Interruption Log (Form 14.01)

## Delegation/Performance Tracking:

- Use Delegation Tips & Assignment Sheets (Forms 15.00, 15.01)
- Conduct daily, weekly, monthly staff meetings (Forms 13.10, 14.03, 14.04)
- Conduct daily prioritization (Top 10 To-Do List) meeting with key staff members (Form 5.06A)
- Conduct weekly case status review meetings with associates and staff (Forms 15.02)
- Use Individual Case Status To-Do Lists (Form 15.02)
- Use automated report from Case Management Software
- Purchase and use case management software

# MISSION STATEMENT



# Sample Mission Statement

## MISSION STATEMENT

Our Mission is to help clients protect their assets, preserve their independence and maintain their security as they confront the issues of aging or illness.

Our vision is to be recognized leaders in guiding clients and their families in successfully navigating the legal and social issues of aging, health care and wealth management.

We accomplish positive results through a unique blend of understanding the issues, skill in their resolution and a pervasive commitment to care, concern and consideration for our clients.

# Goal Grid

FORM 12.01B

Date: \_\_\_\_/\_\_\_\_/\_\_\_\_

**Instructions:** Identify ONE bite-sized goal from your personal or professional Mission Statement in each grid below, then list steps you must take to accomplish it. Afterward, schedule time on your calendar for each action item.

<b>Mission Statement Goal:</b>
<b>10 Year Mark:</b>
<b>5 Year Mark:</b>
<b>1 Year Mark:</b>
<b>90-Day Mark:</b>

<b>Mission Statement Goal:</b>
<b>10 Year Mark:</b>
<b>5 Year Mark:</b>
<b>1 Year Mark:</b>
<b>90-Day Mark:</b>

*Have you blocked out time on your calendar for your 90-Day Mark? If not, please do so.*

# Goal Grid Sample

FORM 12.01C

**Date:** 0/00/01

Instructions: Identify **ONE** bite-sized goal from your personal or professional Mission Statement in each grid below, then list steps you must take to accomplish it. Afterward, schedule time on your calendar for each action item.

<b>Mission Statement Goal:</b> To be in excellent physical condition.
<b>10 Year Mark:</b>
Run a marathon in three continents.
<b>5 Year Mark:</b>
Compete in the Boston Marathon.
<b>1 Year Mark:</b>
Compete in a local marathon.
(Note: Secure trainer at 3 year mark...)
<b>90-Day Mark:</b>
Buy a book on running marathons.
Run ten miles without stopping.
Train three days per week.

<b>Mission Statement Goal:</b> To be more loving and attentive to my wife.
<b>10 Year Mark:</b>
Restate our vows in a special ceremony.
<b>5 Year Mark:</b>
Take her to Europe for two weeks.
<b>1 Year Mark:</b>
Surprise her with a diamond pendant.
Absolutely no more work on weekends.
<b>90-Day Mark:</b>
Take her on a date every Friday.
Be home by 6PM nightly.

*Have you blocked out time on your calendar for your 90-Day Mark? If not, please do so.*



# 1-Year Goals & Initiatives

FORM 12.02

For: \_\_\_\_\_

## PERSONAL GOALS FOR ONE YEAR

### Family

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Spiritual/Self-Development

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Health/Fitness/Personal Well-being

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Social Activities

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Financial

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## PRACTICE GOALS FOR ONE YEAR

### Time Management

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Marketing

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Staffing

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Cash Flow

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Overall Firm Goals

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

# 5-Year Goals & Initiatives

FORM 12.03

For: \_\_\_\_\_

## PERSONAL GOALS FOR FIVE YEARS

### Family

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Spiritual/Self-Development

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Health/Fitness/Personal Well-being

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Social Activities

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Financial

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## PRACTICE GOALS FOR FIVE YEARS

### Time Management

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Marketing

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Staffing

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Cash Flow

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Overall Firm Goals

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

# 10-Year Goals & Initiatives

FORM 12.04

For: \_\_\_\_\_

## PERSONAL GOALS FOR TEN YEARS

### Family

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Spiritual/Self-Development

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Health/Fitness/Personal Well-being

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Social Activities

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Financial

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## PRACTICE GOALS FOR TEN YEARS

### Time Management

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Marketing

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Staffing

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Cash Flow

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Overall Firm Goals

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

# Tolerations

Odds are good that you are “putting up with” much more than you realize. Take a few moments to jot down the tolerations that come to mind in each category, and continue to add to the list as other things surface. This exercise is not intended to create panic! It is merely the first step in stimulating awareness. It is not unusual for our tolerations to go away, slowly but surely, once we put them in writing. Work through them at a pace **(1-5 tolerations per week that you can conquer)** that is agreed upon by you and your coach. Remember to delegate where you can.

## *PERSONAL TOLERATIONS . . .*

### Family

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Spiritual/Self Development

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Health/Fitness/personal Well-being

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Social Activities

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Financial

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## *PRACTICE TOLERATIONS . . .*

### Time Management

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Marketing

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Staffing

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Cash Flow



1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

### Overall Firm Tolerations

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

# Sample Time Template

FORM 13.01

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
7:00 a.m.	Workout		Workout		Workout
7:30 a.m.					
8:00 a.m.					
8:30 a.m.					
9:00 a.m.	Plan Your Week... Include Atticus Homework	15-Minute Mtg.	15-Minute Mtg.	15-Minute Mtg.	15-Minute Mtg.
9:30 a.m.		<b>PRODUCTION</b>			
10:00 a.m.					
10:30 a.m.					
11:00 a.m.	Return Phone Calls	Return Phone Calls	Return Phone Calls	Return Phone Calls	Return Phone Calls
11:30 a.m.					
12:00 p.m.	Marketing Lunch		Marketing Lunch		Internal Staff Lunch
1:00 p.m.			Operations Mtg.		
1:30 p.m.	<b>SEE CLIENTS</b>				 <b>STANDING MARKETING EVENT (i.e. golf)</b> 
2:00 p.m.					
2:30 p.m.					
3:00 p.m.					
3:30 p.m.					
4:00 p.m.					
4:30 p.m.					
5:00 p.m.				Case Status Meeting	
5:30 p.m.	Lower Priority Production	Lower Priority Production	Lower Priority Production		
6:00 p.m.					
6:30 p.m.	Family Meal	Family Meal	Family Meal	Family Meal	<b>Social Events</b>
7:00 p.m.					
7:30 p.m.					
8:00 p.m.					
8:30 p.m.					
9:00 p.m.					

What do you need to schedule time for?	Direct Income	Indirect Income	When do you need to be available for client convenience?			
Production			<input type="checkbox"/> Morning Only <input type="checkbox"/> All Morning & All Afternoon <input type="checkbox"/> Some Mornings & Some Afternoons <input type="checkbox"/> Afternoons Only <input type="checkbox"/> After PM <input type="checkbox"/> On Some Saturdays			
Return Phone Calls						
Marketing						
Case Status Review						
Client Meetings						
Working on Biz						
<b>When are you at your best to do technical work?</b>			<b>Morning</b>		<b>Afternoon</b>	

NOTE: This should be the normal schedule you keep. If you are involved in litigation, you will lose the ability to dictate your schedule for periods of time – but default back to this schedule at the earliest opportunity.

# Weekly Time Template Half Day

FORM 13.01A

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
7:00 a.m.	Work Out		Work Out		Work Out
7:30 a.m.					
8:00 a.m.	Plan Week				
8:30 a.m.					Case Status Meeting
9:00 a.m.	Meet w/Staff	Meet w/Staff	Meet w/Staff	Meet w/Staff	
9:30 a.m.	<b>POWER HOUR</b>				
10:00 a.m.					
10:30 a.m.					
11:00 a.m.	Return Messages (Billable)	Return Messages (Billable)	Return Messages (Billable)	Return Messages (Billable)	Return Messages (Billable)
11:30 a.m.					
12:00 p.m.	Lunch	Lunch	*Marketing Lunch	Lunch	Lunch

\*For the best results, honor the "Atticus Golden Rule" of three marketing lunches per week.

NOTE: Although the afternoon is yours to manage as you choose, continue to batch as many tasks as possible, i.e. meetings, client appointments, calls, etc.

## Companion Time Template for Paralegal

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
7:00 a.m.					
7:30 a.m.					
8:00 a.m.					
8:30 a.m.	Plan Week				Case Status Meeting
9:00 a.m.	Meet w/Attorney	Meet w/Attorney	Meet w/Attorney	Meet w/Attorney	
9:30 a.m.	<b>*ACT AS FILTER FOR ATTORNEY DURING POWER HOUR</b>				
10:00 a.m.					
10:30 a.m.					
11:00 a.m.	Uninterrupted Production and/or Desig Hitter Calls	Uninterrupted Production and/or Desig Hitter Calls	Uninterrupted Production and/or Desig Hitter Calls	Uninterrupted Production and/or Desig Hitter Calls	Uninterrupted Production and/or Desig Hitter Calls
11:30 a.m.					
12:00 p.m.	Lunch	Lunch	Lunch	Lunch	Lunch

\*If you must handle phones while acting as a filter during your attorney's power hour, tackle simple tasks like those outlined below. Perform uninterrupted production time afterward while your attorney is returning calls. Use voice-mail or a live answering service, if necessary.

- Checking email
- Straightening desk
- Working on Systems
- Open/Sort mail
- Clean Office/Library
- Read/Train
- Do Filing
- Generate Reports
- Update Calendars/Database

# Time Template Worksheet

FORM 13.02



	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
<b>7</b>					
<b>7:30</b>					
<b>8</b>					
<b>8:30</b>					
<b>9</b>					
<b>9:30</b>					
<b>10</b>					
<b>10:30</b>					
<b>11</b>					
<b>11:30</b>					
<b>12</b>					
<b>12:30</b>					
<b>1</b>					
<b>1:30</b>					
<b>2</b>					
<b>2:30</b>					
<b>3</b>					
<b>3:30</b>					
<b>4</b>					
<b>4:30</b>					
<b>5</b>					
<b>5:30</b>					
<b>6</b>					
<b>6:30</b>					
<b>7</b>					
<b>7:30</b>					
<b>8</b>					
<b>8:30</b>					
<b>9</b>					

What do you need to schedule time for?		Direct Income	Indirect Income	When do you need to be available for client convenience?			
	Production				Morning Only		
	Return Phone Calls				All Morning & All Afternoon		
	Marketing				Some Mornings & Some Afternoons		
	Case Status Review				Afternoons Only		
	Client Meetings				After PM		
	Working on Biz				On Some Saturdays		
When are you at your best to do technical work?					<b>Morning</b>		<b>Afternoon</b>

NOTE: This should be the normal schedule you keep. If you are involved in litigation, you will lose the ability to dictate your schedule for periods of time – but default back to this schedule at the earliest opportunity.

# Time Template Meeting Agenda

Use this Time Template Meeting Agenda to plan who will attend, what information must be covered and the specific items to be discussed. Complete and distribute the form at least 24 hours prior to the meeting to allow participants sufficient time to prepare.

<b>REQUESTED ATTENDEES</b>  List all staff members that pick up phone calls for the attorney and schedule their appointments, as well as any paralegals or legal assistants who work with the attorneys.	<b>DATE</b>	
	<b>START TIME</b>	<b>END TIME</b>
	<b>LOCATION</b>	

<b>OBJECTIVES</b>  To enroll the staff in supporting the attorney in implementing their time template.	<b>MATERIALS</b> <ul style="list-style-type: none"> <li>• Atticus Form 13.01 Time Template Sample</li> <li>• Atticus Form 13.03 Blank Time Template(s)</li> <li>• Scripts: Atticus Form(s) 13.04 and 13.05</li> <li>• Old Calendar(s) to see what “shows up” regularly for team that should be included</li> </ul>
--	--

<b>AGENDA ITEMS</b>	<b>TIME (90 minutes)</b>
1. Full, straight communication re: the level of support needed/expected from team in order to make the Time Template work. (See Atticus Form 13.04).	10 minutes
2. Show Atticus Form 13.01 and explain Time Template concepts, to include: <ul style="list-style-type: none"> <li>• Power Hour/Production Time</li> <li>• Batching Questions/Managing Interruptions</li> <li>• Making attorney available to team through routine huddles</li> <li>• Fixed block of time for Client Appointments and Return Messages</li> <li>• Case Status Meetings</li> </ul>	30 minutes
3. Discuss Phone Appointment Script – Atticus Form 13.05	10 minutes
4. “Clearing” Opportunity – give staff a chance to share concerns and frustrations around implementing a Time Template.	10 minutes
5. Q & A – Attorney to answer any questions team may have and put their mind at ease.	15 minutes
Optional: Create staff time templates that allow them to block units of time for production.	15 minutes

## NOTES



## Script for Attorney with Staff

I need your support to help me manage my time better. As you know, I end up working a lot of weekends and evenings trying to get all of my work done. But by organizing myself better, with your support, I think I can work more normal hours.

What this means is that I am going to work from this time template (show time template, explain the time blocks you have set up). By following the template, I will have time for everything I need to do – but I won't be trying to do it all at once. I am going to block out time every day to concentrate on my highest priority production. To avoid distractions I am going to close my door during that time. We are used to an open door policy around here and I know this will take getting used to – but please don't interrupt me unless it is a real emergency or my spouse calls (provide a short list of acceptable interruptions).

I know that you can't get your work done unless you have access to me for answers to your questions. So we are going to set up short meetings in order for me to work with you. (Discuss a 15-minute meeting first thing in the morning, a quick meeting before and/or after the attorney emerges from their production time, or a 15-minute meeting at the beginning and end of the day ~ whichever is most appropriate.)

You will need to learn to batch your questions and hold them for me when we meet. Here is a Question Batching form to help you with that. Whenever you get to a stopping place in what you are working on, jot down your question on this and we'll address it in the meeting. Not only will this help me because it will mean fewer interruptions, but it will help you because you will know when I can be available to you and you can get a lot of work done when I am not interrupting you. (Discuss here if you plan to create time templates for staff that complement the attorney's time template. The staff may take turns handling phones while they do their own Power Hours.)

I also need for you to help me protect my time behind closed doors. This time should be blocked off on the calendar and no client appointments scheduled or phone calls put through during this time. Here is a script of what to say when someone calls for me (show script, Form 14.04). It is up to you to make the caller feel taken care of in spite of the fact that I can't talk to them. (Discuss script, modify to your office needs.)

I would appreciate it if you all supported this time template. I give you my permission to remind me when I get off track. The first order of business is to get copies of the template posted near the phones to remind you of when I am and am not available. (Hand out copies, discuss posting them on the wall, discuss inputting the template into the computer calendar.)

## Dialogue Between Staff & Caller

SMILE ~ IT WILL SHOW THROUGH YOUR VOICE!

“Good morning/afternoon! Thank you for calling *(insert law firm name)*.  
This is \_\_\_\_\_ . How may I help you?”

“Unfortunately, Mr./Ms. Attorney is  
*(behind closed doors...in trial...at a closing...etc.)* right now,  
but I know he/she would want you to be taken care of.  
May I ask what this is regarding? *(Insert D/H name)* may be able to help you.”

IF D/H CAN HELP – put the call through.

IF D/H CANNOT HELP...

*(Try to determine how long the call will take in order to schedule it appropriately!)*

“I see. It sounds like it would be best if Mr./Ms. Attorney  
spoke with you by phone...OR...saw you in person.”

“He/She could return your call (or see you) \_\_\_\_\_ or \_\_\_\_\_.  
Which time slot works best for you?”

IF NEITHER TIME SLOT WORKS...

“OK. How about the same time block tomorrow?”

LAST RESORT

“In that case, I will forward your message to Mr./Ms. Attorney  
and he/she will return your call when possible...”

OR

“I could put you through to his/her voice mail if you like.”

IF VOICE MAIL IS ACCEPTABLE – put the call through.

IF VOICE MAIL IS NOT ACCEPTABLE – record a message.

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Power Hour Production Sign

FORM 13.08

POWER HOUR  
IN SESSION



THANK YOU  
for  
Not Interrupting!

FORM 13.08

PRODUCTION  
TIME



THANK YOU  
for  
Not Interrupting!

FORM 13.08



**PRODUCTION  
TIME**

*Thank You  
for  
Not Interrupting!*

# 15 Minute Project Update Form

FORM 13.10

Instructions: Update your attorney/supervisor routinely on non-legal matters during a pre-scheduled 15-minute huddle daily or weekly, as needed. Record new tasks as they occur and determine/calendar the "next step" as a team!

Date:    /   /        Update on Work in Progress     New Task Assigned by Supervisor

\_\_\_\_\_  
\_\_\_\_\_ (A)

\_\_\_\_\_  
\_\_\_\_\_ (B)

Next Step: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_ (C)

By When:

Updated Calendar

Date:    /   /        Update on Work in Progress     New Task Assigned by Supervisor

\_\_\_\_\_  
\_\_\_\_\_ (A)

\_\_\_\_\_  
\_\_\_\_\_ (B)

Next Step: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_ (C)

By When:

Updated Calendar

Date:    /   /        Update on Work in Progress     New Task Assigned by Supervisor

\_\_\_\_\_  
\_\_\_\_\_ (A)

\_\_\_\_\_  
\_\_\_\_\_ (B)

Next Step: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_ (C)

By When:

Updated Calendar

NOTES:

# Law Office Interruption Log

FORM 14.01

1. Briefly describe all unexpected interruptions. Include phone calls, attorney/staff/personal crises, drop-in visitors/clients, visual or audio distractions. Keep this log for two weeks.
2. Fax your Atticus Practice Advisor the results at the end of the two-week evaluation period.
3. Analyze the results with your Atticus Practice Advisor using the evaluation questions on the Interruption Log Analysis Sheet (Form 14.01A).

**External Interruptions**

LENGTH OF INTERRUPTION	PURPOSE/SUBJECT	WHO/WHAT			IMPORTANCE		
		Person	Phone	Environ	A	B	C

**Self-Imposed**

LENGTH OF INTERRUPTION	PURPOSE/SUBJECT	WHO/WHAT			IMPORTANCE		
		Person	Phone	Environ	A	B	C



# Interruption Log Analysis Sheet

1

Review the information you collected on your Interruption Log (Form 14.03). **Who** or **what** are your habitual interrupters? (You may find it helpful to review your findings with other staff members to see if they are experiencing the same type of interruptions.)

_____	_____
_____	_____
_____	_____

2

What are your **major** time robbers? (attorney/staff, clients, meetings, crises, phone, home)

_____	_____
_____	_____
_____	_____
_____	_____

3

How many hours per day do you spend handling #1 and #2? \_\_\_\_\_

How many hours per day should you spend? \_\_\_\_\_

4

Use this chart to help find solutions for underlying causes of your major interruptions as listed in questions 1 and 2. **Write down as many solutions as you can think of, even if they seem impossible or impractical**, i.e. I need my attorney/staff to leave me alone...OR...I need a door!

CAUSE	POSSIBLE SOLUTIONS

5

For the next 30 days, commit to three solutions that are most viable.

6

At the end of 30 days, go back and review your progress. Did you realize a time savings? If so, congratulations! Now, go back to your original log and choose another interrupter to tackle. If one or more of the solutions you chose did not work, re-evaluate them using these questions:

- ▼ What worked and didn't work?
- ▼ Were the solutions reasonable and realistic?
- ▼ Are there additional solutions that need to be explored? Does someone else need to be involved?
- ▼ How have others in your firm managed? Can you make their solutions work for you?

# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# General Meeting Checklist

FORM 14.03

This checklist will help insure that all of the factors that contribute to a successful meeting have been considered.

---

## BEFORE

- Has an agenda been prepared?
- Is there a clearly stated objective?
- Is there enough time to distribute the agenda in advance?
- Are individual items on the agenda given a time limit proportional to their value?
- Is all necessary information and support material available?
- Are key players available?
- Is the meeting room comfortable?

---

## AFTER

- Tie up loose ends – add unfinished business to next agenda.
- Clearly indicate assignments made.
- Expedite the preparation of the minutes.
- Summarize decisions reached and actions to be taken.
- Distribute to all interested parties.

# General Meeting Agenda

FORM 14.04

Use this General Meeting Agenda to plan who will attend, what information must be covered and the specific items to be discussed. Complete and distribute the form at least 24 hours prior to the meeting to allow participants sufficient time to prepare.

<b>REQUESTED ATTENDEES</b>	<b>DATE</b>
	<b>START TIME</b> <b>END TIME</b>
	<b>LOCATION</b>

<b>OBJECTIVES</b>	<b>MATERIALS</b>
-------------------	------------------

<b>AGENDA ITEMS</b>	<b>TIME</b>

---

## NOTES

# Partners Meeting Agenda

FORM 14.05

Use this meeting agenda to plan partner's meetings and outline the specific items to be discussed. Complete and distribute this form at least 24 hours prior to the meeting to allow partners with sufficient time to progress.

AGENDA ITEMS	Notes
<p>1. <b>Finance</b> (include bookkeeper when appropriate, discuss all that apply, allot ____ min.):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Review Dashboard and/or A/R, A/P, P&amp;L reports</li> <li><input type="checkbox"/> Discuss special collections issues</li> <li><input type="checkbox"/> Discuss cashflow projections for upcoming month, quarter</li> <li><input type="checkbox"/> Discuss productivity, timekeeping, billing issues</li> <li><input type="checkbox"/> Approve large purchases, monitor budget variances</li> <li><input type="checkbox"/> Other: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> </ul>	
<p>2. <b>Staffing</b> (discuss all that apply, allot ____ minutes):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Discuss personnel problems, upcoming reviews</li> <li><input type="checkbox"/> Discuss plans to fill open positions, vacation coverage</li> <li><input type="checkbox"/> Discuss training to be conducted</li> <li><input type="checkbox"/> Discuss employee benefits</li> <li><input type="checkbox"/> Other: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> </ul>	Notes:
<p>3. <b>Marketing, Client Development</b> (discuss all that apply, allot ____ minutes):</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Set monthly marketing goals (include charitable and community sponsorships)</li> <li><input type="checkbox"/> Discuss media, advertising or PR opportunities</li> <li><input type="checkbox"/> Discuss client service goals, client retention issues</li> <li><input type="checkbox"/> Review number of referrals, compare to goal, discuss follow-up actions</li> <li><input type="checkbox"/> Other: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> <li><input type="checkbox"/> Action items: _____ Who: _____ By when: _____</li> </ul>	Notes:



# S.M.A.R.T. Rules for Delegation

## ***SMART* RULES FOR DELEGATION**

**Specific:** If there is a high level of trust and this is a frequently delegated task, you can be less specific. But if this is the first time it is delegated, and there is little experience or familiarity, you must be very specific about all the actions to be taken, possibly putting them into written form, depending on the complexity of the task.

**Measurable:** Establish exactly what you intend for the outcome. If possible, quantify the result. State it clearly and ask for it to be repeated back to check for accuracy.

**Accountable:** Select someone who will take ownership of the project or task. Someone who will communicate results in a timely fashion and will not try to cover up, require lots of attention or reassurance.

**Realistic:** Create checkpoints along the way to check the progress and quality of the work. Allow extra time for mistakes that are part of the initial learning curve – just make sure you have a way to catch them. Don't delegate something that isn't humanly possible to accomplish in a given time frame. Make sure you provide adequate resources to get the job done – if time is short, more assistance may be required.

**Timeline:** State very clearly the date for completion, any checkpoint dates, and the impact of not meeting the deadline. Remember that the **FIRST** time any task or project is undertaken, it will take longer to accomplish. Expect increased efficiency with repetition.

### Notes

Questions to ask yourself when trying to decide if it is worth delegating a task:

- Does this require MY special skills?
- Could someone else do this?
- How often will this task be done in the future?

# Delegation Form

FORM 15.01

Directions: Fill out one of these forms for each task you delegate. Either dictate this form and have a staff member fill it out, or write it out and give the staff member a copy. Keep your copy in a file folder for easy retrieval. If you prefer to delegate by e-mail, be sure to cover all the important details involved in SMART delegation.

**Assigned To:** \_\_\_\_\_ **By:** \_\_\_\_\_

**Today's Date:** \_\_\_/\_\_\_/\_\_\_ **Due Date:** \_\_\_/\_\_\_/\_\_\_

**Priority Level:** \_\_\_ **A** \_\_\_ **B** \_\_\_ **C**

**INSTRUCTIONS:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please:** \_\_\_ run with this task and report back to me upon successful completion.  
\_\_\_ check in with me \_\_\_ daily \_\_\_ weekly \_\_\_ bi-monthly \_\_\_ monthly.

I prefer to remain informed via a(n) \_\_\_ verbal update \_\_\_ written report \_\_\_ email

*Contact me immediately if you CANNOT meet the due date assigned,  
OR you need additional resources to accomplish this task!*



# Request for Assistance As Easy as 1-2-3!

FORM 15.01A

**STEP 1** – Delegator and Delegatee meet to define the task and come into agreement around a due date. “Date Due” is filled in and delegatee takes original. Delegator keeps a copy and tickles calendar with the due date. Delegator pulls the form and checks in with the Delegatee when the due date rolls around...

**The Task:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Date:	____/____
Date Due:	____/____
Date Done:	____/____

**STEP 2** – Delegatee must work backward from the due date. List all action items necessary to complete the task on time. Create sensible by-whens and hold yourself accountable every step of the way...

- Action: \_\_\_\_\_ By: \_\_\_\_/\_\_\_\_  Done
- Action: \_\_\_\_\_ By: \_\_\_\_/\_\_\_\_  Done
- Action: \_\_\_\_\_ By: \_\_\_\_/\_\_\_\_  Done
- Action: \_\_\_\_\_ By: \_\_\_\_/\_\_\_\_  Done
- Action: \_\_\_\_\_ By: \_\_\_\_/\_\_\_\_  Done
- Action: \_\_\_\_\_ By: \_\_\_\_/\_\_\_\_  Done
- Action: \_\_\_\_\_ By: \_\_\_\_/\_\_\_\_  Done
- Action: \_\_\_\_\_ By: \_\_\_\_/\_\_\_\_  Done

**STEP 3** – Delegator and Delegatee meet to review/evaluate the outcome. Delegator to fill in “Date Done” and rate the result below. A copy of the result is placed in the Delegatee’s personnel file for review at next evaluation...

Supervisor’s Rating of Task Upon Completion:	<input type="checkbox"/> Exceeds	<input type="checkbox"/> Met	<input type="checkbox"/> Below
	Expectation	Expectation	Expectation
SUPERVISOR’S COMMENTS:			
_____			
_____			

# Case Status Organizer

Create your form using the layout below. Allow space for all your files.

File Name	Tasks	By Whom	Date Asgn.	Date Due	Financial Status?
<b>Open-Active</b>					
<i>Jones</i>	<i>File Pleading</i>	<i>Sandra</i>	<i>12/1</i>	<i>12/5</i>	
<b>Open-Suspended</b>					
<b>Open – Needs Closed</b>					
<b>Projects</b>					

Case Status Meeting Questions to Ask:

- 1) What did we do last? (Use this question to remind yourself of last action taken.)
- 2) What could we or should we have done? (This is valuable to new staff so they learn the flow of the case from the beginning.)
- 3) What do we do next? (Discuss the next best action.)
- 4) By whom and by when? (Consider the time needed for the task. Staff to block time on calendar immediately & raise red flag if additional time or resources are needed, or if a deadline change is in order. Attorney can also use this as a tool to block time as well by including their own tasks in the task section.)
- 5) Always check the financial status of each non-contingent fee case

# Case/File To-Do List

FORM 15.02A

<b>File Name:</b>	<b>1<sup>st</sup> Response:</b>	<b>Date to Close:</b>
<b>Assigned to:</b> _____ <b>on</b> ____ / ____ / ____	<b>Date to File:</b>	<b>Statute of Lim:</b>

Instructions: Keep this form with the case file, on top of other documents, in order to monitor work flow. (Use Form 15.02 to pull files for review prior to our routine Case Status Meeting.) Review the Case To-Do List for each file. Discuss/document new tasks or the next step(s) required to bring the case to a successful close. *Don't forget to update calendars as needed!*

\_\_\_ **New Task(s)** \_\_\_ **Next Step**

---



---

_____	<b>By When</b> ____ / ____ / ____	<i>Updated Calendar</i>	
-------	-----------------------------------	-------------------------	--

\_\_\_ **New Task(s)** \_\_\_ **Next Step**

---



---

_____	<b>By When</b> ____ / ____ / ____	<i>Updated Calendar</i>	
-------	-----------------------------------	-------------------------	--

\_\_\_ **New Task(s)** \_\_\_ **Next Step**

---



---

_____	<b>By When</b> ____ / ____ / ____	<i>Updated Calendar</i>	
-------	-----------------------------------	-------------------------	--

\_\_\_ **New Task(s)** \_\_\_ **Next Step**

---



---

_____	<b>By When</b> ____ / ____ / ____	<i>Updated Calendar</i>	
-------	-----------------------------------	-------------------------	--

\_\_\_ **New Task(s)** \_\_\_ **Next Step**

---



---

_____	<b>By When</b> ____ / ____ / ____	<i>Updated Calendar</i>	
-------	-----------------------------------	-------------------------	--

\_\_\_ **Active** \_\_\_ **Suspended** \_\_\_ **Needs Closed** \_\_\_ **Other/Special**

# **EXTRA FORMS**

---

The following forms are duplicates of our most popular forms, provided for your convenience.

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____



# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____



# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____



# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____



# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____



# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____



# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Weekly Planning Form

Instructions: Review upcoming deadlines, work backward on trial dates, and closely monitor client promises. Fax this form to your coach upon completion on a designated day each week for added accountability.

**PRIORITY PRODUCTION:** What are your most important production goals this week?  
(Set appointments for these tasks in the "Production Section" of your Weekly Time Template!)

_____	_____
_____	_____
_____	_____

**PRODUCTION SUPERVISION:**  
List the most important tasks you are supervising/tracking this week.

_____	_____
_____	_____
_____	_____

**MARKETING ACTIVITIES:**

*Who will you initiate contact with?*

*Attend lunches with?*

_____	_____
_____	_____
_____	_____

**SYSTEMS/OPERATIONS ~** How will you improve your systems/operations this week?

_____	_____
_____	_____
_____	_____

**ADMINISTRATIVE GOALS:**

_____	_____
_____	_____
_____	_____

**STAFFING:**

What can you do to...

- Acknowledge/reward/motivate staff? \_\_\_\_\_
- Train staff? \_\_\_\_\_
- Hire staff? \_\_\_\_\_
- Meet with your Designated Hitter? \_\_\_\_\_
- Practice delegating more? \_\_\_\_\_

**PROFITABILITY/FINANCIAL GOALS:**

_____	_____
_____	_____
_____	_____

<b>FAMILY/PERSONAL GOALS:</b>	<b>EXERCISE GOALS:</b>	<b>SPIRITUAL GOALS:</b>
_____	_____	_____
_____	_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /      /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /      /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /      /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**


# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Daily To-Do List

FORM 13.07

<b>HIGH PRIORITY PRODUCTION :</b>
<b>DELEGATED/SUPERVISED:</b>
<b>MARKETING ACTIVITIES:</b>
<b>ADMINISTRATIVE TASKS:</b>

<b>TODAY'S DATE:</b> /     /
7:00 a.m.
7:30 a.m.
8:00 a.m.
8:30 a.m.
9:00 a.m.
9:30 a.m.
10:00 a.m.
10:30 a.m.
11:00 a.m.
11:30 a.m.
12:00 p.m.
12:30 p.m.
1:00 p.m.
1:30 p.m.
2:00 p.m.
2:30 p.m.
3:00 p.m.
3:30 p.m.
4:00 p.m.
4:30 p.m.
5:00 p.m.
5:30 p.m.
6:00 p.m.
6:30 p.m.
7:00 p.m.
7:30 p.m.
8:00 p.m.
8:30 p.m.
9:00 p.m.

**PHONE CALLS TO MAKE:**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**





# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_

\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

\_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_

\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

\_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_

\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

\_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**





# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**





# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**





# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**





# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**





# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_  
\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

(C)

\_\_\_\_\_  
\_\_\_\_\_

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

(B)

**Feedback:** \_\_\_\_\_

(C)

**By When:**

Updated Calendar

**NOTES:**



# Question Batching Form

FORM 14.02

Instructions: Avoid ambushing your attorney/supervisor by batching questions throughout the day to share during your daily/weekly prescheduled huddle. Document feedback, agree upon a by-when if necessary, and calendar ALL action items!

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_

\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

\_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_

\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

\_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**For:** \_\_\_\_\_ **Date:** \_\_\_\_ / \_\_\_\_ / \_\_\_\_

**Question:** \_\_\_\_\_

(A)

\_\_\_\_\_

\_\_\_\_\_

(B)

**Feedback:** \_\_\_\_\_

\_\_\_\_\_

(C)

**By When:** \_\_\_\_\_

Updated Calendar

**NOTES:**

