

SELF
ASSESSMENT
INCLUDED

JOURNEYING BEYOND THE STORM



A TRAVELING GUIDE FOR
EXECUTIVES AND MANAGERS

MAURICE VELASQUEZ

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*To my wife, Leah, three wonderful children,
Nathan, Becca, and Nicholas, without
whom much I do would be impossible, and
who inspire me everyday.*

*To my mentors,
David Shiroda, James Barnes, and
Hank Linden, who taught me much of what
I know about business and leadership.*

*And to my parents,
for always believing in me and
encouraging me to press on.*

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Storming Is Impeding Your Growth

Storm

/ stôrm /

verb

A forceful disturbance of the atmosphere, accompanied by harsh conditions which threaten or cause damage, e.g. "We may weather the storm, but only if we've prepared beforehand."

Storming is real. This is almost as much a law of the business world as it is a law of the natural world. Like in nature, getting past the business storm is where things become clear again and the journey becomes pleasant. Storming is what keeps our businesses from growing. It is indeed one of the primary and unsolved problems which stunt corporate growth. Therefore, if you

want to grow your business, you must learn how to reduce and get past storming.

In his seminal work on team development, Bruce Tuckman defined storming as that phase in the life of teams where the internal workings become dysfunctional and the breakdown of communications hinders them from growing or getting to the next level. Tuckman says storming is unfortunately the phase in which most companies find themselves. You may have referred to it as something other than storming, but everyone knows how storming feels. Consider your own storming experience:

Before storming happened, the company was formed and it was growing; it enjoyed a degree of teamwork, collaboration, and decision-making that stimulated growth. Although at first there were differences, the teams were able to make quick decisions, brainstorm in unity, and progress effectively. The culture was productive, and, although things may have seemed chaotic because everyone had to

pull their weight and wear many different hats, there was a spirit of teamwork that made the growth not only possible but enjoyable. Then something happened along the way, something you were hoping would happen: you grew.

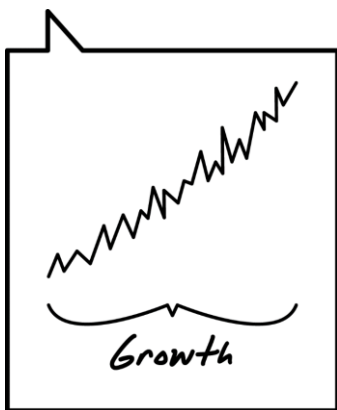


Diagram 1: Growth

The company grew. Your teams grew. The number of employees grew. Your work grew. Perhaps even your office space grew. Even now your company may find itself in a season of growth. But things are a lot more difficult. There are a lot more conflicts to work through.

What happened to communication?

Communication now seems all over the place. You are not on the same page as you once were. You aren't even so sure you are in the same book. You are still growing, but you've hit some kind of plateau that no longer allows you to move quickly, with efficiency and order. Executives are involved in much more management than is healthy, and managers attempt to work and communicate across departments without much success.

What happened to making good decisions?

Agreement on decisions is now harder to reach, and when things do get decided, you find little buy-in and accountability. Project implementation requires much more energy and conflict than it used to. Decisions are now having to be made suddenly with just a few people driving everyone else, and these are usually last-minute decisions, on the fly, placing things in a constant state of change. The rest of the team sincerely asks one another, "What is going on?" The answer? In

short: you grew the company well. But now that you have grown to this level, your teams are not able to work as harmoniously as they once did.

What happened to meetings and processes?

You have outgrown your processes, your systems of communication, your decision-making, and perhaps even your policies and procedures. It is very difficult to get everyone on the same page anymore.

Meetings are not as effective. Everyone now only use hurried “hallway conversations” to make decisions. Some people are told of decisions; others must play catch-up. Email is over-used, and directions and decisions are now only announced whereas they used to be collaborated. There seems to be different agendas, different timelines, and different viewpoints of how things ought to get done.

What happened to direction and growth?

You know you should be able to get to the next level, but “something” is not allowing

your team leaders to work as well as you once did. Your bottom line growth may be a fraction of what it was once was. Or your bottom line is growing but your internal corporate turmoil is growing along with it. You may still have a good culture, but you know there is a prevailing sense of discontentment, and everyone “feels” that things are no longer smooth, no longer able to move forward together toward clear goals. Employee morale is waning.

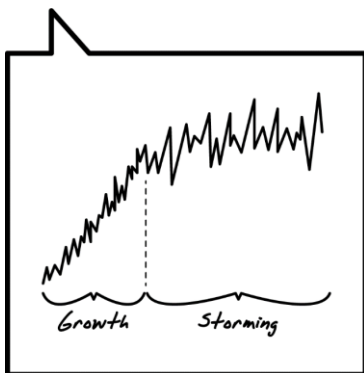


Diagram 2: Growth always leads to storming

Are you in any of this now?

If you are, you are storming, to one degree or another. So, what's your plan? You must

get out of storming. You know this. If you don't get out of storming, several things are guaranteed: you will have to be satisfied with limited growth and limited results. Ideas and innovation will remain stifled. Problems will go unresolved, and employees will start to leave, or worse, they will stay but they will disengage. Employees often times leave because they feel no one is listening anymore, things get unbearable, and they are willing to jump to another company for a few dollars more—or sometimes for less or equal pay—so long as the teamwork atmosphere is better, calmer, healthier.

This is how storming becomes your biggest liability, the cause for stunted growth, and ultimately, the cause of losing your business.

You must get out of storming and you must learn how to deal with it well each time it occurs. But how do you get out of storming?

A Highway of Communication

Before the interstate highway system was built, the country had grown to be a formidable world power. But with new technology and bigger demands of national security, it was necessary to establish a more organized level of transportation. So in the 1950's, the United States Congress, being prompted and persuaded by President Eisenhower, established the most important transportation infrastructure across the entire country. This is the Interstate Highway System. This system of transportation has allowed millions of people to move themselves, their families, and their products and cargo, across state lines with an incredible amount of ease and efficiency. The automobiles are all different. The people are all different. The products and cargo change all the time. But as long as the highway system remains, everyone using

it can be confident they can get to where they want to go much faster and more effectively. Since its earliest days, the highway system has matured: signage has increased, road quality has improved, it is now paired with the latest technology (accessible in our hands), and companies have flourished along this major economic lifeline.

When we talk about companies journeying past the storm to next-level growth, we are talking about laying down an improved framework and structure of communication upon which we can drive all different kinds of issues, problems, projects, and solutions easier and better.

We are, in effect, creating a communication highway system for our business.

As long as this communication infrastructure is in place, we can move things back and forth, create improvements, and even consider stacking systems upon one

another, perhaps like we see happening to the interstates in major cities like Houston and Los Angeles. As long as corporate alignment gives us the structure we need, our teams can discuss anything, collaborate on anything, and figure anything out. But if the highway of communication breaks down or bottlenecks, everything goes back to storming. Maintain the highway, and everything becomes easier, despite the task at hand.

In each of the sections below, we will discuss how to set the journey, how to have the travelers work better with each other while on the journey, how to use the same roadmaps to give everyone better direction, and how to lay down the highway infrastructure so that the journey becomes more successful and enjoyable for everyone, especially our clients.

I do not promise storms will end. Quite the opposite. Storms will occur as you grow (and sometimes bigger storms), but with new collaboration and better disciplines on your new communication highway, you

will not stay stuck in storming. You will move to stabilized and organized growth.

The goal is to decrease unnecessary storming, move faster through necessary storming, and steadily grow your teams, your operation, and your bottom line.

Let's get started...

The Journey

Like on any trip, you have to set the journey and see the big picture of how you plan to get from A to B. At this point, you don't get too deeply into the details because you are only mapping out the big picture. But setting the picture is important, because if you can agree on the basics, the journey will be possible.

This journey of growth has two directions: *your executive goals being communicated down to the teams* and *your teams' problems and ideas being communicated up to the executives*. This may seem basic, but often times storms cloud our focus. Our focus should be on reaching company goals and taking care of the needs of our front-liners and customers. That's the journey, and in order to weather any storm, we have to regularly be revisiting and realigning all we do to our goals. This means

fixing things that are broken, things which keep us from moving ahead.

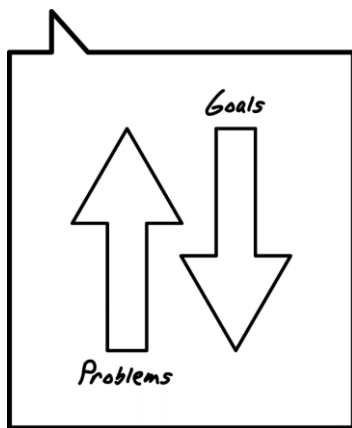


Diagram 3: The Journey

Here we need to ask ourselves two key questions:

1. *Do we have our 6-12 months executive goals or list of Top Projects clearly defined and published?*
2. *Do we have a list from the front-liners of the problems, ideas, and issues that need to be addressed or fixed?*

The reason to start generating these documents is so everyone can have the same direction and focus. Company goals must be regularly communicated to the teams; likewise, problems, ideas, and issues from the front-liners must be regularly communicated to the executives.

With the basic journey set out, we can then discuss how the travelers work better together to make this journey possible.

The Travelers

The travelers are the team members in the organization, including executives, managers, and front-liners. Just like on a trip, when the travelers get along the journey is pleasant and successful. Anything is possible.

So, to help the team work better together, the next step is to define the roles of the travelers and how they are to participate in the journey together. The following graph gives you a visual aid of the alignment model, which can help everyone stay focused on their roles, help everyone stay in their lanes, and help everyone support one another in their respective areas:

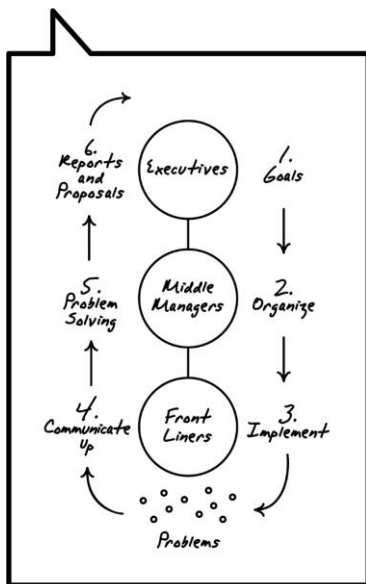


Diagram 4: The Alignment Model

*First, the executives are to focus on the goals and direction of the business. They are to speak in terms of outcomes and **Top Projects** that drive the executive goals and the direction of the business. Like on a road trip, they provide the points of destination in the GPS.*

Second, the middle managers are supposed to join the executives and strategize

*with the executives on the Top Projects and the direction, but their focus is to organize, collaborate, and generate a **Game Plan** to support the Top Projects. Like on a road trip, the middle managers are the GPS which gives the travelers clear and unified movement.*

Third, the front-liners are supposed to give their input on the game plans, but their focus is to implement the game plans as a united front in order to provide excellent service to clients and customers. Like on a road trip, the front-liners are the ones who make the experience a reality and make things happen. When it's all said and done, they are the drivers, heeding the GPS directions or not.

Fourth, problems and issues will arise which will challenge the implementation of the game plans, so the front-liners and teams are to identify, collect, and communicate up what is broken and what needs attention by the supervisors and middle managers. Like on a road trip, these problems can be small delays, distracting detours, or major engine

problems.

*Fifth, the middle managers and supervisors are to regularly review the problems and issues, helping **fix what is broken**.* They help determine which problems should be resolved by front-liners, which issues should be fixed by the middle managers, and help resolve problems and provide answers so the front-liners can better help customers.

Sixth, for the many problems that need executive solutions and approval, the middle managers are to present on-going proposals, proactively engaging executives for executive approvals. They are to also keep the executives updated on progress reports and the status of various projects. The executives are to act promptly and give answers so problems can be quickly identified and solved. Like on a road trip, the driver addresses the major issues.

By everyone agreeing that these are the roles of all the travelers, it is more likely that everyone will be focused on the goals of the company, and that problems identified

from the front-liners are being regularly considered and resolved. This also ensures that problems are being identified and fixed by the right people. The journey becomes more pleasant like this, and it is a lot easier to weather storms as a team. Only then will the company experience stabilized and organized growth.

Quick Check-Up:

- *Are roles clearly defined between executives, managers, and front-liners?*

The GPS Roadmaps

We have established that the journey is to reach our corporate goals and address the problems front-liners identify. We have established the roles of the travelers. Now we have to tackle the GPS roadmaps. On a road trip, if we use the right map or GPS as a guide, the journey is successful. If we wing it, or rarely check the map or GPS, we fill the journey with confusion, frustration, and unnecessary delays. The same is true in business. If we all get on the same page, and regularly guide ourselves by that page, we will create a unified front to implement corporate goals and fix problems.

But it's not enough to say "get on the same page." That is a worn-out cliché offering little direction outside of a vague plea for "someone to please get organized"

or “please agree with what I want.” No, what needs to happen is to actually put a plan, a map onto that page, to write things down on that page and regularly guide ourselves by those written documents so we can all truly and sincerely “stay on the same page.” Only then can we adjust things as needed and focus everyone’s attention.

If you do not commit to working from the same written documents, then storming will continue to be your reality.

If you do not work from the same documents, you will over-use email, chase different versions of attached files, and hope hallway conversations align people, all the while complaining about having so many useless meetings. We need to commit to roadmaps and using the same GPS.

Here are the basic key documents – the roadmaps – which every team needs on a regular basis to stay focused, organized, and accountable. Samples of each can be

found in Appendix D or on Team Real World's OnDemand library.

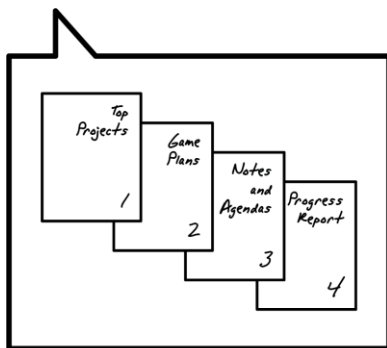


Diagram 5: Key Documents (Road Maps)

1. **Top Projects:** This is a two-to-three page document listing out the ten or fifteen top projects to move the company forward in the next three to nine months. This document is the product of the executive retreat, where executives have considered and constructed a strategic plan, recommitting to the company's mission, vision, and values. While this is where executives learn to lead from the front, the top projects

document must be a collaborative effort between executives and managers. Each project has a short definition, the metrics defining success, one person assigned to “quarterback” the project, the team members who participate in this project, and the deadlines showing milestones and completion. The executives have to approve this, and, together with the managers, present it to the company at the quarterly company meeting (as well as revisit it to track and reward progress at each quarterly meeting). Executives should focus 90% of their time defining these projects and supporting oversight and implementation, while not taking over and micro-managing the projects themselves. The documents outlining Top Projects should have the mission, vision, and values of the company in the header or the footer.

2. **Game Plans:** Each project has a game plan, a one-to-two page document that outlines the project in detail, with specific tasks assigned to people or teams, with phases as needed, including deadlines for all tasks and milestones, and a budget to track costs, profits, and losses. The project quarterback and teams are to get input from frontline staff, draft each game plan, include the necessary processes or procedures, and present to the executives for final approval *before* starting the project. If the project needs to start soon, or if the project has already started, then the quarterbacks need to hurry up and draft the game plan so the project does not continue without a written and approved roadmap. The mark of a great quarterback is to manage their projects from a regularly updated game plan that is reviewed and revisited at the rhythm meetings

(these meetings will be discussed in the next chapter).

- 3. Notes and Agendas:** Each meeting should be led from a one-page agenda, and each meeting should be followed up with a one-page set of notes from that meeting. The agendas need to be sent out the day before each meeting, and the notes need to be sent out no later than four hours after each meeting. The agendas include the items assigned, the top projects, progress reports on projects, and new items to discuss. Meeting notes include the items assigned, the items decided, and the items discussed. These notes and agendas are the core documents that keep everyone accountable and make sure things are moving forward.

If things are not moving forward, ask yourself two questions:

First, are the meetings for those projects being run from well-written notes and agendas?

Second, is everyone being faithful to follow through with their specific tasks or action items?

In Appendix C we have included powerful guidelines on how to run meetings more effectively with these roadmaps.

4. **Progress Reports:** Every project needs a one-page report of some kind to track the progress, costs, profits, metrics, and other key performance indicators of that project. These reports can be in Word, Excel, or generated from similar instruments or online services, but they have to be kept updated on a weekly or bi-weekly basis (or more frequently as needed). These reports are included in their respective meeting agendas and

used to make decisions and adjustments, re-aligning everyone for the next one to two weeks. This is the point in the journey where I hear the most complaints:

"Really, Maurice? All these written documents? Isn't this too much?"

I recommend you start slowly, steadily learning to use the basic documents listed above. Do this for a period of six to ten months so everyone can get used to the disciplined habit of having great journeys with written roadmaps. This takes a while. Pace yourself. Communicate the changes on the front end. Start small but stick to the discipline. It will bear fruit. Remember, to grow a business well you will later need to add other written documents like processes and procedures, training guides, as well as documentation for coaching,

correction and dismissals. But don't go overboard and try to implement all this at once. You'll create unnecessary storms and this will sour everyone.

In summary, getting out of storming is an agreement from the top down that going forward you will define things on paper. You'll assign quarterbacks and team leaders to manage projects better, and everyone is going to learn how to stay on the same page for each individual project. You'll meet regularly, in a somewhat orderly fashion (to be further explained next chapter), and you'll adjust as you go. But you will always check yourselves to make sure you are consistently "on the same road, with the same map, and heading the same direction."

A Note on "Shared Documents": These files work best if you place them in your shared network folders with the appropriate level of access rights to the executives,

managers, quarterbacks and team members. Everyone updates the shared documents and everyone agrees to only send each other the link to the updated files. Shared documents will allow you to align everyone better, increase communication, and you'll see which team members are managing projects well and which ones need support or more mentoring. Which shared documents platform should you use? You can go with Sharepoint, Microsoft Solutions, Google Drive, or any other online system with security and protection, or you can use your internal network file structure. But whatever you do, discontinue using individual, stand-alone files that people keep on their individual computers, sharing as email attachments. This creates deep discontinuity between versions of the document, and it can even erase large portions of work others have done on that document. This is what it means to get on the same page. There needs to be an actual page.

*Without a page governing activities,
you will stay storming.*

Quick Check-Up:

- *Do we operate from written documents?*
- *Do we work from shared documents?*

Building the Highway

Now that we have defined the journey, we've agreed on everyone's roles in the journey, and we have committed ourselves to working from written documents, we can start building the actual "communication highway." This highway is the flow of communication and collaboration from the top of the organization, to the managers, to the front-lines, and back up from the front-liners to the managers, and up to the executives. It is the core infrastructure that keeps everyone aligned and headed in the same direction.

What is the highway and how do you build it?

The highway has two components. The *rhythm pit stops* and the *walk-around implementation*. The pit stops are always

formal; the walk-around implementation can be both formal and informal.

Rhythm Pit Stops: These are the key meetings that need to be set up to where the travelers convene, regroup, revisit, discuss, debate, collaborate, decide and execute all the goals, projects, ideas, tasks, problems, and solutions of the journey. It's where teams talk about the whole of the business, review the top projects, report on progress, and deliver on assignments. It's where everyone participates in professional discussions and crucial conversations to move things forward. It's where everyone comes out saying the same thing, committed to the same game plan, aware of the same timelines, and supporting the same decisions.

Rhythm meetings are where everything is formally managed from the updated roadmaps.

Here are the basic set of rhythm pit stops that should be set up. Each meeting has its own note-taker to help with all notes and agendas.

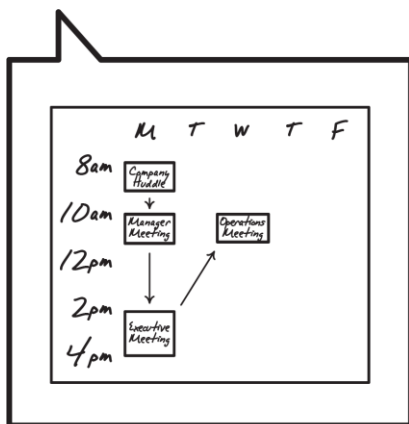


Diagram 6: Rhythm Meetings (The Communication Highway)

- **Company Huddle:** These are weekly, positive, informative meetings where executives and managers update everyone, praise performance, discuss trends, and rekindle everyone's vision to the goals of the company.

- **Executives Only:** These are weekly meetings where executives discuss all projects in the Top Projects document and even those projects in their own “Executive Top Projects” document (projects that need to be handled only by executives, that may or not eventually make their way to the corporate-wide Top Projects document). At every other weekly meeting, the executives invite managers to come and report on Top Projects, make presentations when needed.
- **Managers with and without Executives:** These are weekly meetings where the managers and quarterbacks review and regroup on all Top Projects, collaborate on all games plans and decisions for those projects, and regularly agree on implementation, accountability, and executive reporting. Every other

week, managers invite the executives to sit through the whole meeting, join the discussions, and assist with decisions. At least once per month, managers invite supervisors, team leaders, and frontliners to make presentations, report on problems, or just come to watch and learn how to have great cross-departmental meetings.

- **Independent Meetings between Certain Departments:** In every company, there are two or three departments that need to meet on a more regular basis than other departments. These meetings are crucial because they determine a lot of what the other departments need, even though these meetings do not need to have all departments present. In some companies, it may be a meeting between sales, engineering and quality control. In other companies, it may be IT and

programming. These are different based on the company and how the teams collaborate on Top Projects.

- **Managers and Their Staff:** Every manager needs to have a regular rhythm pit stop with their whole team, with their individual team members, and daily huddles as needed. These are the meetings when the managers dissect the implementation of goals and projects, and where they discuss in detail the problems that have risen, the solutions that need to be implemented by the team, or the things that need to be resolved with other departments or escalated up to the executives.

These meetings between managers and their staff is when front-liners have the most amount of influence.

They listen to the customers, talk amongst each other, propose new processes, and collect new problems that may need attention from other departments or from the executives. Managers usually say they don't have weekly meetings because they don't have a lot to discuss with front-liners. But these meetings are crucial. It's where managers can get the most up-to-date details on how the journey is going.

These rhythm pit stops between managers and front-liners are the ones that should happen all the time, on a consistent basis.

Overseeing Meetings: Other meetings may be needed on a project-by-project basis, on a temporary basis, or may need to be one-off meetings. Still, all meetings exist to ensure the Top Projects are healthy and properly executed.

On a quarterly basis, executives

should ask for a report from all managers on the meetings they are having. These reports should include the purpose of the meeting, the frequency, the team members participating, and what those meetings have produced and accomplished. The executives should visit all meetings at least once per quarter, perhaps even attending meetings unannounced, to ensure proper availability and oversight.

The Directors of Operations or the COOs should be attending all the key meetings to ensure that everyone is on the same map. Appendix B shows how Steve Jobs helped the COOs in his company ensure alignment from meeting to meeting. The COO should ensure there are no bad meetings.

Walk-Around Implementation: This is the other component of the highway. Walk-around implementation happens both formally and informally once everyone comes out of the rhythm pit stops. Everyone goes to their respective teams promptly to

announce the updated game plan, and discuss, organize, brainstorm, and dissect how to implement that plan. The walk-around discussions also collect feedback from others, plan how to train employees, and decide how to deliver excellent service to clients and customers. This walk-around implementation happens every day in order to create real progress, ensure successful implementation, quickly identify and report problems, and even help create the meeting agenda for the following week. Everyone focuses on following through on their tasks, and everyone waits until the next meeting to bring up any new projects. However, any emergencies or urgent issues which threaten the existing projects must be brought up immediately, without waiting for any formal pit stop meeting.

Here I must give a brief word to the Directors of Operation and COOs . Get the organizational chart out and keep it updated. Ensure it is updated and published anew every three months. Use it to determine when to schedule rhythm pit

stops, and make sure each group of employees has a weekly or bi-weekly meeting when they can talk with their supervisors/managers both in a staff setting and in an individual setting.

Take No Shortcuts: At this point, both seasoned and new players in the workforce quickly state that such a discipline of rhythm pit stops are not really necessary because “*after all, we talk all the time.*” But there is a serious misunderstanding here.

There is a serious misunderstanding that informal chatter is the same as healthy collaboration, that being operational means being organized.

The type of “talk” to which they are referring is the informal, inconsistent type of hall-way discussions and behind-closed-door meetings. Some informal touches are important and may need to happen from time to time, but an over-dependence on informal chatter does not produce the level

of true collaboration needed for team and corporate alignment. However, if all chatter, hallway conversations and informal discussions, are happening to help provide better alignment at the rhythm meetings, then this is healthy and good. It's not an either/or. Good communication requires both the informal and formal, as long as it exists to align and update roadmaps (Top Projects, game plans, and progress reports).

"We meet every week to talk about all that we are doing. And we have great teamwork at the top of the company which filters down to great teamwork throughout the company." – Steve Jobs

Stay the Course

What about personality differences? When do you conduct a SWOT analysis? When should we move into a Six Sigma or another industry standard model? What about different styles of decision making in the meetings? What about conflict management and how to hire awesome employees? What about forming and publishing the organizational chart? All these are most definitely important parts of having a great journey, and we need to address them in separate publications, but the disciplines presented here are the essential ones that will provide you the safeguards to get out of storming and onto the next level.

As you make progress with and master the disciplines presented in this book, you can layer on top other skills and important elements.

The one thing to keep in mind is this: if the executives and managers are aligning every week, and if everyone works from the same roadmaps, then everything else is possible. Why? Because you will have built and will know how to safeguard the structure in which your teams will collaborate, accomplishing anything you set out to do. But if the rhythm breaks down, and everyone reverts back to working from different (or no) written documents, everything will be jeopardized, and you'll soon be stuck in storming once again. Your goals will suffer. Your problems will go unresolved. And it will be much more difficult to get back to alignment and growth.

Keeping routine is indeed difficult. But it is vitally important to your growth. Hang these final thoughts on your rear-view mirror so you don't easily forget them:

First, when you start growing again, expect more – and bigger – storms to appear. It's a law of business-nature. More growth generates more problems, which generate

more storms. In a growing company, storming is inevitable. These tools and disciplines will help you minimize storming and get to the next level of growth.

Second, drop the attitude and approach that says "people just need to get along and get to work". That's neither true management nor good leadership. People will only get along when managers and executives facilitate an environment where ideas can flourish, problems can be openly discussed, and everyone as a single team supports the decisions being made. Your role as an executive and manager is to set up and facilitate that environment by using and mastering the tools and disciplines we've outlined here.

Third, be ready for the "dip." When any team begins to re-align, it will likely stir a new set of tension, discouragement, and disagreement. This is normal, so don't lose heart. Journey through this together and get aligned. It's on the other side of this dip where you will find the next level of growth.

This is not easy. No great journey

worth taking ever is. But it pays off. This will help you better train your new hires on how you face challenges and solutions as a team. You will stimulate growth, and you will build great leaders throughout the company when you do this. Your clients and customers will notice the difference. So will your corporate reputation.*

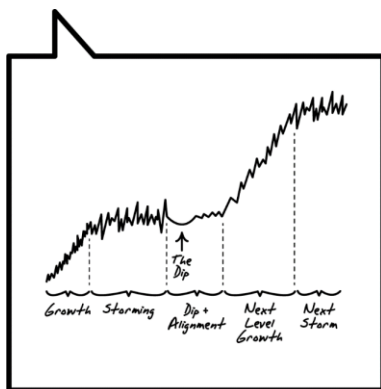


Diagram 7: The Dip & Next Level Growth

*Tuckman in his work describes the alignment phase as “norming” and the next-level growth phase as “performing.” His four phases are forming, storming, norming, and performing. In future publications, we’ll further dissect each one of these.

To close, I leave you with four guiding principles:

Do this as a team.

Keep the disciplines.

Be patient with one another.

As you mess up, don't give up.

And be realistic about your degree of storming: Appendix A provides a storming self-assessment.

Appendix A

*You can take this survey on-line.
Go to www.teamrealworld.com/storming-self-assessment/*

Storming Self Assessment

- ① Most like my team
- ② Somewhat like my team
- ③ Unsure
- ④ Somewhat unlike my team
- ⑤ Most unlike my team

COMMUNICATION

- | | | | | | |
|--|---|---|---|---|---|
| Communication seems all over the place | ① | ② | ③ | ④ | ⑤ |
| Not on the same page across projects | ① | ② | ③ | ④ | ⑤ |
| Low efficiency in cross-departmental collaboration | ① | ② | ③ | ④ | ⑤ |
| Executives too involved in minutia and management | ① | ② | ③ | ④ | ⑤ |

DECISION-MAKING

- | | | | | | |
|---|---|---|---|---|---|
| Agreement on decisions hard to reach | ① | ② | ③ | ④ | ⑤ |
| When things do get decided, there is slow buy-in and implementation | ① | ② | ③ | ④ | ⑤ |
| Project implementation requires much more energy and conflict than it used to | ① | ② | ③ | ④ | ⑤ |
| To move things forward, some people aggressively push decisions forward even if it means catching others by surprise or sudden changes. Some people are told of decisions; others must play catch-up. | ① | ② | ③ | ④ | ⑤ |

MEETINGS AND PROCESSES

- Seem to have outgrown our processes, policies and procedures (1) (2) (3) (4) (5)
- Things do not get put in writing, and we operate mostly from verbal decisions, or lots of emails (1) (2) (3) (4) (5)
- Meetings are not effective, or too many meetings (1) (2) (3) (4) (5)
- "Hallway conversations" or private discussions is where things seem to get decided (1) (2) (3) (4) (5)

CULTURE AND IDEAS

- There is an undertone of discontentment of things not going smoothly, no longer able to move forward together toward clear goals. Things change a lot. (1) (2) (3) (4) (5)
- Employee morale waning (1) (2) (3) (4) (5)
- New ideas get shot down quickly (1) (2) (3) (4) (5)
- Problems from the frontlines go unresolved; problems identified by frontliners are downplayed as either gossip or complaining (1) (2) (3) (4) (5)

Total Score:

If your score is 75-80: Great job! Very aligned. Keep up the good work.

If your score is 65-74: You are storming too much. Need coaching.

If your score is below 65: You are likely stuck in storming. Need training.

Appendix B

Disciplines and Routines



*Picture from 2010 D8 Conference
(<https://youtu.be/f6odhel4ARg>)*

In 2010, Steve Jobs was one of the keynote speakers at the D8 Conference. This 1 ½ -hour interview is a journey into Steve's outlook on Apple, the industry and his approach to building great companies.

The following is a fascinating 2.5 minute snapshot of how he summarized how to manage teams with rhythm meetings and great teamwork. Here is the transcript of what he said, followed by an outline where we dissect the guidelines he followed:

The Transcript

Steve: "One of the keys to Apple is that Apple's an incredibly collaborative company and so...you know how many committees we have at Apple? Zero. We have no committees. We are organized like a startup. One person is in charge of iPhone OS software, one person in charge of Mac hardware, one person is in charge of iPhone Hardware engineering, one person is in charge of worldwide marketing, another person is in charge of operations. We are organized like a startup. We are the biggest start up on the planet, and we all meet for three hours once a week. We talk about everything we're doing, the whole business. There's tremendous teamwork at the top of the company which filters down tremendous teamwork throughout the company. And teamwork is dependent of trusting the other folks to come through with their part without watching them all the time, but trusting that they're going to come through with their part. That's what we do really well.

We are great at figuring out how to divide things up into these great teams that we have, and all work on the same thing, touch bases frequently and bring it all together into a product. We do that really well. And so what I do all day is meet with teams of people and work on ideas, and solve problems to make new products, to make new marketing programs, whatever it is."

Interviewer: "And are people willing to tell you you're wrong, other than snarky journalists, people who work for you?"

Steve: "Oh yeah. We have wonderful arguments."

Interviewer: "And you win them all?"

Steve: "Oh no, I wish I did. No, see you can't. If you want to hire great people and have them stay working for you, you have to let them make a lot of decisions and you have to be run by ideas, not hierarchy. The best

ideas have to win. Otherwise good people don't stay."

Interviewer: "But you must be more than a facilitator who runs meetings? You obviously contribute your own."

Steve: "I do. I contribute ideas. Sure. Why would I be there if I didn't?"

Outline of Steve's Approach to Collaboration

Defined roles - "One person is in charge of iPhone OS software, one person in charge of Mac hardware, one person is in charge of iPhone Hardware engineering, one person is in charge of worldwide marketing, another person is in charge of operations.

Rhythm of meetings throughout all teams

- "We all meet for three hours once a week. We talk about everything we're doing, the whole business. There's tremendous

teamwork at the top of the company which filters down tremendous teamwork throughout the company.

What it means to really be a team -

Teamwork is: “dependent on trusting the other folks to come through with their part without watching them all the time, trusting that they're going to come through with their part.”

Commitment to this routine of

collaboration: “That's what we do really well...”

- a. “We are great at figuring out how to divide things up into these great teams” - break projects into teams
- b. “All work on the same thing”
- have a defined set of projects (top projects)
- c. “We touch bases frequently”
- another nod at the commitment of rhythm meetings

d. “We bring it all together into a product.” - the commitment to follow through to the finish line

The role of the COO, Director of Operations or the President (if there is no COO, Director of ops): “So what I do all day is meet with teams of people and work on ideas, and solve problems to make new products, to make new marketing programs, whatever it is.”

Commitment to having good discussions and professional disagreements:

Interviewer: “Are people willing to tell you you're wrong, other than snarky journalists, people who work for you?”

Steve: “Oh yeah. We have wonderful arguments.”

Interviewer: “And you win them all?”

Steve: "Oh no, I wish I did."

Steve understands the connection between empowering employees and losing employees: "No, see you can't. If you want to hire great people and have them stay working for you, you have to let them make a lot of decisions and you have to be run by ideas, not hierarchy. The best ideas have to win. Otherwise good people don't stay."

Steve's ability to be a good facilitator of meetings (which he expected of all his managers):

Interviewer: "But you must be more than a facilitator who runs meetings? You obviously contribute your own."

Steve: "I do. I contribute ideas. Sure. Why would I be there if I didn't?"

Appendix C

Guidelines on Meetings, Notes, and Agendas

Guidelines on Meetings

1. Start on time; everyone come ready to “get into it”; niceties, get started, commit to the agenda.
2. Fill up the agenda with a focused list of weighty matters of the business; adjust as you go.
3. When you get to “New Business”, people should have one-page proposals ready to present and discuss.
4. Assign someone as facilitator.
5. Assign someone as note-taker (taking notes and visible on projector or on a shared screen if remote).

Guidelines on Notes

1. Notes go out to participants within four business hours after meeting; or by 10am next morning.

2. Follow the guidelines on the templates and samples here.
3. Each entry / topic shows up only one time in the notes; don't make anything repetitive.
4. If the item....
 - a. Has an item assigned or an action item, this goes into "Items Assigned"
 - b. Has a decision, but no assignment, it goes under "Items Decided"
 - c. If it was not assigned nor decided, only discussed, it goes into "Items Discussed"
5. Questions that should be asked before moving to the next topic:
 - a. Does this item have an item assigned before we move on?
 - b. To whom was that assigned?
6. Unless specified otherwise, all items are checked next week to ensure follow through

Guidelines on Agendas

1. First thing to do in every meeting is review the agenda and adjust it quickly to get started; don't have meetings without agendas.
2. The agenda goes out to everyone at least 24 hours before the beginning of the meeting.
3. The email sending the agenda should include all necessary documents to allow everyone to read and prepare.
4. Everyone should look at the items attached instead of waiting for the meeting to read.
5. Do not expect to drive a decision at the same meeting where the proposal was announced; exceptions are allowed, but a proposal needs at least 1 week's review so everyone can properly contribute and give buy-in.

6. Announce when items for the agenda are due so people can send their items.

Appendix D

Sample Documents

*You can download all these documents by
subscribing to Team Real World OnDemand.*

*Go to www.teamrealworld.com
and click "online" to subscribe.*

Game Plan Sample

COMPANY ABC
Video & Commercials Project
Game Plan
July 18, 2015

GOALS

1. Create 1st class videography team to produce high-quality commercials for clients for all platforms.
2. Organize and execute assembly of sellable inventory for sales team to monetize commercials.
3. Create distribution strategy and follow the "everywhere there are eyeballs" outlook.
4. Develop analytics management plan to keep track of our performance for programming and sales.

GAME PLAN

1. Present budget and proforma for phase 1 and 2 below by.....7/15
2. Phases
 - a. Phase 1 - Getting Started - Streaming Video of Selected Existing Shows to the World
 - i. Within a few weeks of 8/1, Lori and Tony evaluate the ability of the video producers, highlighting any liabilities/concerns.
 - ii. Soft Launch8/7
 - iii. Hard Launch8/7
 - b. Phase 2 - Producing commercials for clients only.....10/15
 - i. Green room / in-house production room
 1. Green room
 2. Production bay
 3. Videography computers / server?
 4. Room renovation to manage traffic flow of personnel
 5. Experienced Commercial videographer, outsource
 6. Budget
 - a. Phase 3 - Stand-Alone Commercial Producing Production House.....2/15
2. Team and Roles
 - a. Digital Media Manager.....Lori Barker
 - i. Branding adherence
 - ii. Quality control
 - iii. Managing video production
 - b. Sr. Video Producer.....Tony Samprino
 - i. On-set, off-set and studio (mevo) video production
 - ii. On-set elements management
 - iii. Coordination with on-air producers and talent (show prep)
 - iv. Videography editing and commercial production
 - c. Video Producer.....Nathan Daniel
 - i. On-set, off-set and studio (mevo) video production
 - ii. On-set elements management
 - iii. Coordination with on-air producers and talent (show prep)
 - iv. Videography editing and commercial production

Top Projects Template

Mission of company: enter your 1 line mission statement here. If you have space put your values here -- value 1, value 2, value 3, value 4

Top Projects Template

Company Name | Latest Date Updated: _____

| PROJECT NAME | DEPT | PRIORITY | QB | 1-2 Line Description | SUCCESS METRICS | TEAM MEMBERS | GAME PLAN | 1 LINE UPDATE ON THIS PROJECT | MILESTONE (Due Date) |
|--------------|------|----------|----|----------------------|-----------------|--------------|----------------------------|-------------------------------|----------------------|
| | | | | | | | Click Here | | |
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Top Projects Sample

Mission of company: enter your 1 line mission statement here. If you have space put your values here --> value 1, value 2, value 3, value 4

Top Projects Sample

Company Name | Latest Date Updated:

Priority: 1-High (now) 2-Medium (soon) 3-Soon after that

| PROJECT NAME | DEPT | PRIORITY | QB | 1-2 Line Description | SUCCESS METRICS | TEAM MEMBERS | GAME PLAN | 1 LINE UPDATE ON THIS PROJECT | DUE DATE |
|------------------------------|-------|----------|--------|---|--|----------------------------|----------------------------|---|-------------------------------|
| Sales Campaigns | Sales | 1 | Larry | Add new platforms to sales campaigns; train sales reps and create campaigns by client | Qtr 1 - 8% Qtr 2 - 12% Qtr 3 - 12% Qtr 4 - 10% | Barry, Molly, Aaron | Click Here | Draft campaigns on new business of agenda for 7/10 | Have on platform-1 /15 |
| Client reports | Sales | 1 | Bob | Monthly client reports of key accounts and campaigns for each | 100% key fields with information Budget for each | Keith, Pam, Monica | Click Here | Will have all reports for weekly sales meeting next week. Few reports pending. | Final draft by 11/5 |
| Corporate Team Day | HR | 2 | Ellen | Let's do this thing. Fun! | 80% attendance 70% survey input 45% morale increase | Denise, Mark, Jennifer, Jo | Click Here | Venues reserved paid New budget on agenda for 7/11. Problems with music. Will have update at mtg. | Gameplan complete by 10/12 |
| Update phone software | IT | 2 | Luke | Prepare and install new phones for planned 4th quarter growth | Call/conversation ratios report On Hold % reports | Patty, June | Click Here | Still in beta. 10% modules left to be tested. We're 3 weeks behind schedule. On agenda for next week. | Completed by 12/30 |
| Customer satisfaction survey | Admin | 2 | Pamela | We skipped 2nd quarter (this hurt sales). Regroup and recommit for 2019. | 80% client participation Budget for gifts Weekly report | Derrick | Click Here | Click on game plan link. We will present and discuss at exec meeting on 7/20. On agenda. | Have report complete by 11/10 |
| Employee Handbook | HR | 3 | Laura | Update all sections discussed w/ attorney | Schedule of phase reviews | Denise, Ellen, Chad | Click Here | Meeting set for 7/10 with team to get data on social media policy | Published by 12/15 |
| Furniture -Lobby | Admin | 3 | Maggie | The new lobby and conference rooms will need furniture. | 3 competing quotes Showfloor samples | Star, Bob, Cheryl, Tyler | Click Here | 2 vendors in line. Tyler will get meet floor plan on 8/6. By 9/15, we will have complete game plan. On schedule. | Order the furniture by 1/15 |
| Install new servers | IT | 3 | Wendy | Facing a bandwidth crash; revisit vendor relationship & improve service contract | Bandwidth increase 60% storage capacity 4+ network printers Expandability | Ben, Gabe, Roe, Carl | Click Here | Quote attached to the 7/10 meeting agenda. CFO and team reviewed and ready to present. We are 8% over budget. We'll explain at mtg. | Order servers by 1/15 |

Notes Template

Notes Template

Name of Company
Meeting Name
Date Goes Here
Notes

Attendees at meeting: name, name, name, name, name, etc....

1. Items Assigned (tasks)

- a. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- b. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- c. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- d. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- e. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here

2. Items Decided

- a. Topic name - this is where you write a 1-2 line decision of the items that were decided in the meeting. Don't go over 2 lines. But if you have to, you can enter bullets as needed:
 - i. Here you can write a 1-line sub-point to give more clarity of what was decided
 - ii. Here you can write a 1-line sub-point to give more clarity of what was decided
 - iii. Here you can write a 1-line sub-point to give more clarity of what was decided

3. Items Discussed

- a. Topic name - here you enter a 1-line and short description of what was discussed
- b. Topic name - here you enter a 1-line and short description of what was discussed
- c. Topic name - here you enter a 1-line and short description of what was discussed
- d. Topic name - here you enter a 1-line and short description of what was discussed

4. Top Projects

- a. Item 1 of top projects we are tracking to make sure they hit upcoming agendas
- b. Item 2 of top projects we are tracking to make sure they hit upcoming agendas
- c. Item 3 of top projects we are tracking to make sure they hit upcoming agendas
- d. Item 4 of top projects we are tracking to make sure they hit upcoming agendas
- e. Item 5 of top projects we are tracking to make sure they hit upcoming agendas
- f. Item 6 of top projects we are tracking to make sure they hit upcoming agendas

Notes Sample

Notes (sample)

STANFORD PETROLEUM, INC

Executive | Managers Meeting

June 1, 2018

Notes

1. Items Assigned (tasks)

- a. Invoicing - make sure the 6/30 & 8/11 invoices were turned in.....Randy
- b. Onboarding
 - i. Send out written assignment to team to get started.....Don
 - ii. Request that accounting have ready the initial steps.....Don
 - iii. Update the "Onboarding New Employee" Process to the team.....Don
- c. Staff meeting - the team will continue meeting to define meeting.....Jean
- d. Funding- get with director to review timelines/requirements for preparation.....Randi
- e. Dep't meetings w/ Exec Director - Dianne is reviewing the google folders/files.....Don
- f. Volunteers - talking w/ hospital to define program.....Randi
- g. Manager meeting - send invites to managers mtg (last Wed of month).....Victoria

2. Items Decided

- a. On-Boarding Team (sub-team of the "Staff Development Team" initiative)
 - i. Leader: John
 - ii. Members: John, Paul, George, Ringo, Peter, Paul and Mary
 - iii. Resources: Laurel, Hardy, Lewis
 - iv. Other team members in the Staff Dev Team: Frank, Dean, Ellen
 - v. Assignments/Deliverables:
 - 1. Steps
 - 2. Timeline
 - 3. Responsibility
 - vi. We will do a dry-run this coming Monday for the 3 new hires. Don drives this.
- b. Quarterly Staff Meetings
 - i. John presented draft agenda, edited it, and approved it.
 - ii. This team is the permanent team to plan out all staff meetings so everyone can get ahead
- c. Finance Director: hold hiring this position, no other action for now (revisit in 2 months)
- d. Recruitment of Sales Manager: Denise starts tomorrow (8/17)
- e. Rhythm of teams – Don will start bringing items from the Red team to this meeting

3. Items Discussed

- a. How efficient are these meetings. No decisions made. Good discussion.
- b. The sample of the gift packet for this quarter top performing team members. All progressing well.

4. Top Projects for next week's meeting:

- a. Blood Drive
- b. Global Sales campaign
- c. Invoicing cycles
- d. Don's assistant recruitment
- e. Employee handbook
- f. Digital footprint and web site project

Agenda Template

Agenda Template

Team Real World
Operational Meeting
June 1, 2018
Agenda

1. Praise / Recognition

- a. Topic here - Only 1 line here for a praise/recognition of a certain team/person
- b. Topic here - Only 1 line here for a praise/recognition of a certain team/person
- c. Topic here - Only 1 line here for a praise/recognition of a certain team/person
- d. Topic here - Only 1 line here for a praise/recognition of a certain team/person

2. Reports

- a. Report name goes here
- b. Report name goes here
- c. Report name goes here
- d. Report name goes here

3. Items Assigned

- a. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- b. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- c. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- d. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- e. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- f. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here
- g. Topic name - write max 1 line of assigned task here. No more than 1 line.....Name here

4. Top projects to discuss at this meeting

- a. Item 1 of top projects we are tracking to make sure they hit upcoming agendas
- b. Item 2 of top projects we are tracking to make sure they hit upcoming agendas
- c. Item 3 of top projects we are tracking to make sure they hit upcoming agendas
- d. Item 4 of top projects we are tracking to make sure they hit upcoming agendas
- e. Item 5 of top projects we are tracking to make sure they hit upcoming agendas
- f. Item 6 of top projects we are tracking to make sure they hit upcoming agendas
- g. Item 7 of top projects we are tracking to make sure they hit upcoming agendas

5. New Business / New proposals

- a. Item 1 of new business - write max 1 line of assigned task here. No more than 1 line
- b. Item 2 of new business - write max 1 line of assigned task here. No more than 1 line
- c. Item 3 of new business - write max 1 line of assigned task here. No more than 1 line
- d. Item 4 of new business - write max 1 line of assigned task here. No more than 1 line
- e. Item 5 of new business - write max 1 line of assigned task here. No more than 1 line

Agenda Sample

Agenda (sample)

STANFORD PETROLEUM, INC

Executive | Managers Meeting

June 1, 2018

Agenda

1. **Reports / Announcements**
 - a. Sales report
 - b. Invoicing | AR Report
 - c. Grant status report
2. **Items Assigned (tasks)**
 - a. Invoicing - make sure the 6/30 & 8/11 invoices were turned in.....Randy
 - b. Onboarding
 - i. Send out written assignment to team to get started.....Don
 - ii. Request that accounting have ready the initial steps.....Don
 - iii. Update the "Onboarding New Employee" Process to the team.....Don
 - c. Staff meeting - the team will continue meeting to define meeting.....Jean
 - d. Funding- get with director to review timelines/requirements for preparation.....Randi
 - e. Dep't meetings w/ Exec Director - Dianne is reviewing the google folders/files.....Don
 - f. Volunteers - talking w/ hospital to define program.....Randi
 - g. Manager meeting - send invites to managers mtg (last Wed of month).....Victoria
3. **Top Projects**
 - a. Global Sales campaign
 - b. Invoicing cycles
 - c. Don's assistant hire
 - d. On-Boarding process
4. **New Business**
 - a. Truck fleet paperwork process
 - b. New HR processes (draft)

Project Progress Report Sample

| CORPORATE EVENT TICKET SALES | | | | | | | | | | | | | | | | | | | | |
|--|-----------|-----------|---------------|-------------|------------|--------------------------|-----------|---------------|-------------|------------|-----------|--------------------------|---------------|-------------|------------|----------------------|-----------|---------------|-------------|--------------|
| General Admission (\$10) | | | | | | Corporate Tickets (\$10) | | | | | | VIP Tickets (\$110 each) | | | | Other Tickets (\$10) | | | | Total Amount |
| | 4 Tickets | 8 Tickets | Total Tickets | Total Sales | % of Total | 4 Tickets | 8 Tickets | Total Tickets | Total Sales | % of Total | 4 Tickets | 8 Tickets | Total Tickets | Total Sales | % of Total | 4 Tickets | 8 Tickets | Total Tickets | Total Sales | % of Total |
| 5/10/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/11/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/12/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/13/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/14/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/15/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/16/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/17/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/18/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/19/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/20/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/21/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/22/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/23/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/24/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/25/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/26/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/27/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/28/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/29/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/30/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| 5/31/2018 | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$30,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% | 1,000 | 2,000 | 3,000 | \$33,000 | 100% |
| Total Year To Date | 10,000 | 20,000 | 30,000 | \$300,000 | 100% | 10,000 | 20,000 | 30,000 | \$300,000 | 100% | 10,000 | 20,000 | 30,000 | \$330,000 | 100% | 10,000 | 20,000 | 30,000 | \$330,000 | 100% |
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Individual Progress Performance Sample

| MONTHLY PROGRESS REPORT FORM (individual employee performance) | | | | | | | | | | | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|---------------------------------|---|---|--|--|--|--|--|--|--|
| Employee Name: Name Goes Here | | | | | | | | | | Employee Title: Title Goes Here | | | | | | | | | |
| Supervisor Name: Name Goes Here | | | | | | | | | | Employee Title: Title Goes Here | | | | | | | | | |
| 1/5 2/4 3/6 4/5 5/5 6/4 7/4 8/3 9/2 10/2 11/1 12/1 12/31 | | | | | | | | | | 1/30 3/1 3/31 4/30 5/30 | | | | | | | | | |
| RESPONSIBILITIES | | | | | | | | | | | | | | | | | | | |
| OVERALL DUTIES | | | | | | | | | | | | | | | | | | | |
| Monthly Compliance Reports | | | | | | | | | | 1 | 1 | 2 | | | | | | | |
| Advertising workshops and seminars | | | | | | | | | | 3 | 3 | 3 | | | | | | | |
| Updating online calendar | | | | | | | | | | 3 | 3 | 3 | | | | | | | |
| Assist in training in monthly onboarding | | | | | | | | | | 2 | 3 | 3 | | | | | | | |
| Send out workshop cancellations - weekly | | | | | | | | | | 2 | 2 | 1 | | | | | | | |
| PROFESSIONALISM | | | | | | | | | | | | | | | | | | | |
| Coachable and proactive to learning | | | | | | | | | | 1 | 2 | 3 | | | | | | | |
| Team player and works well with others | | | | | | | | | | 2 | 2 | 3 | | | | | | | |
| Proactive and demonstrates problem-solving skills | | | | | | | | | | 3 | 3 | 3 | | | | | | | |
| Communication skills and participation in team discussions | | | | | | | | | | 2 | 2 | 3 | | | | | | | |
| Identifies and communicates problems | | | | | | | | | | 2 | 2 | 2 | | | | | | | |
| Other: | | | | | | | | | | | | | | | | | | | |
| VALUES OF COMPANY | | | | | | | | | | | | | | | | | | | |
| Value 1: Passion | | | | | | | | | | 3 | 3 | 3 | | | | | | | |
| Value 2: Attitude | | | | | | | | | | 3 | 3 | 3 | | | | | | | |
| Value 2: Hardwork | | | | | | | | | | 3 | 3 | 3 | | | | | | | |
| Value 4: Teamwork | | | | | | | | | | 2 | 2 | 3 | | | | | | | |
| TRAINING / COACHING / CORRECTION: | | | | | | | | | | | | | | | | | | | |
| Excel Training for Pivot Tables | | | | | | | | | | | | | | | | | | | |
| Time Management for Organization | | | | | | | | | | | | | | | | | | | |
| Error action here: | | | | | | | | | | | | | | | | | | | |
| Error action here: | | | | | | | | | | | | | | | | | | | |



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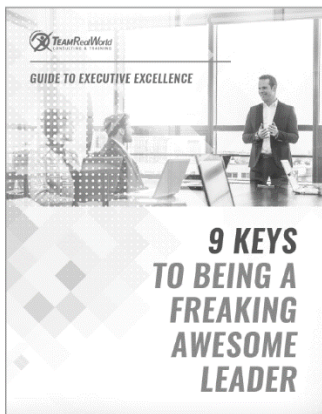
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About the Author

As founder and president of Team Real World, Maurice Velasquez is a proven leader with extensive expertise in client relationship, focus on aligning teams and a track record for helping clients communicate and execute effectively. He works with executive teams to design their unique program and facilitates the collaboration with middle managers to lead their companies to sustainable growth. He is now the senior consultant at Team Real World and host of the Winning in the Workplace radio show.

**STORMING IS REAL. IT'S WHEN INTERNAL
TURMOIL KEEPS THE BUSINESS FROM GETTING TO
THE NEXT LEVEL. IF YOU WANT TO GROW YOUR
BUSINESS, YOU HAVE TO GET PAST STORMING.**

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Tim McKey, President & CEO, VISTA Consulting

"This book was like a Maurice mini-seminar. It succinctly captured every concept in the Alignment Model. It's an easy read. We're still using it to stay aligned. I found myself dog-earring pages to make sure I go back and revisit them. I loved the 30-min refresh."

**Chad V. Scott, PE, Managing Partner, CORE Health Networks
CEO, CORE Occupational Medicine Canada, ULC**

"Running a complex non-profit, we're in a constant storm as funding and community needs change from year to year, and week-to-week. Maurice's method works. We use it daily and while we can't avoid the turbulence, his model helps us navigate through and emerge more weather resistant, constantly growing stronger."

**David C. Aguillard, MPA, MHA, MA, Executive Director, Catholic
Charities of the Diocese of Baton Rouge**

"This is pocket-size so you can easily study it together as leaders. The game-changer for us has been the weekly rhythm of meetings where executives and managers talk and make decisions together. Great toolbox!"

Chad Dudley, Managing Partner, DudleyDeBosier

