

A man with short brown hair, wearing a blue button-down shirt, is sitting at a wooden desk. He is smiling warmly at the camera. In front of him on the desk is a white mug and a pair of glasses. The background is a blurred office or library setting with bookshelves and a window.

Management and Productivity Made Simple

*How to Run Your Small
Business Using Only 5 Meetings*

With
Donald Miller

WELCOME TO

Management and Productivity

The most important investment you make when growing your business is in the people you hire. They can also be your biggest expense.

Most small businesses fail to scale because they don't have a system that allows them to manage people well and get things done. Instead, they rely on to-do lists, impromptu meetings, quick phone calls at all hours, emails that get lost in the barrage of emails, and confusion about who is supposed to be doing what. Even if you're a solopreneur, the constant meetings with contractors and vendors and the folks you depend on to form a team might be driving you crazy. And it is costing you.

You need a repeatable system that ensures these four things happen:

1. Everybody knows what the primary objectives of the business are
2. Everybody knows what their department's responsibilities are to contribute to those objectives
3. Everybody knows what their personal responsibilities are through clear assignments with deadlines
4. Everybody is getting consistent feedback on how they are doing

If those four things sound like something you need and would like to incorporate into your business, you're watching the right on-demand course. What you need is a management and productivity system. You need a system that organizes the way you and your team get your work done.

Management and Productivity Made Simple is going to teach you to run your small business using only five meetings. That may sound like a lot but the great news is these five meetings will replace almost all of your other meetings, plus all those late-night phone calls, emails, and text messages. You are going to replace organized chaos with a routine set of meetings that will take place at the same time on the same days each week and when you do, your team is going to be aligned. As a leader, Management and Productivity Made Simple will get you more time back in your week to focus on growing your business. You'll know everyone is focusing on the right priorities and your team is united in purpose.

Here's to growing yourself and your business.



Your Management and Productivity Problems Are About to Go Away

Notes

Management and Productivity Made Simple gives you a playbook to help you align your team, have less meetings, get more done, and grow your business.

Most small businesses fail to scale because they don't have a system that allows them to get things done.

What we all need is a simple management and productivity system we can use to organize our work and our teams. We need a repeatable system that ensures these four things happen:

1. Everybody knows what the primary objectives of the business are
2. Everybody knows what their department's responsibilities are to contribute to those objectives
3. Everybody knows what their personal responsibilities are through clear assignments with deadlines
4. Everybody is getting consistent feedback on how they are doing

The Five Meetings That Will Transform Your Company

Have less meetings, get more done, and grow your business.

The five simple meetings that are going to align your team and organize your business:

1. All-Staff Meeting
2. Leadership Meeting
3. Department Stand-up
4. Personal Priority Speed Check
5. Quarterly Performance Review

The incredible benefit of the Management and Productivity Made Simple Playbook is that it will scale with your small business. You can install the first meeting even if you work alone and have no one else on your team. When you start adding contractors or team members, you can install the next meeting and then the next and the next. If you start to feel organized chaos creeping in, it's likely time to install the next meeting in the playbook.

In the following videos you will be introduced to each of the meetings. Each meeting will have a corresponding template you will learn how to use to conduct the meetings and transform your company.

Notes

The All-Staff Meeting

Notes

The primary purpose of the All-Staff Meeting is to unite your entire team around the three economic priorities of the business.

Key Takeaways:

When you include three primary economic objectives in your overall mission and repeat those objectives in your weekly All-Staff Meeting, your entire team begins to unify around those objectives and their work gets more focused.

A few benefits of the All-Staff Meeting are:

- An increase in focus from reviewing the Mission Statement and Guiding Principles each week
- Team alignment through department updates and announcements
- An opportunity to honor teammates and boost morale through shout outs

Reflection Questions for You or Your Team:

1. When will your All-Staff Meeting be held? Or, if you are a solopreneur, how will you use the template to keep yourself focused on what is important?

2. How will you decide which departments will present?

3. How will repeating your priorities each week be helpful for you or your team?

Company Priorities:

Your economic priorities should directly relate to the financial bottom line but don't have to represent the selling of products.

Department Updates:

The key with these department updates is that each department should talk about what they are doing to help the business make progress toward the economic objectives.

COMPANY PRIORITIES

BY _____

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DEPARTMENT UPDATES

①

What has our department done or what are we going to do to move us towards our company goals?

How did we add value to our customers last week?

How are we adding value for our customers this week?

②

What has our department done or what are we going to do to move us towards our company goals?

How did we add value to our customers last week?

How are we adding value for our customers this week?

③

What has our department done or what are we going to do to move us towards our company goals?

How did we add value to our customers last week?

How are we adding value for our customers this week?

All-Staff Meeting

DATE

April 15, 2022

COMPANY PRIORITIES

BY January 1, 2023

①

Sell 1,000 Dog
Food Subscriptions

②

Partner With 100
Veterinarian Offices

③

Reach 500 Pet
Owners With
Online Dog Training
Program

DEPARTMENT UPDATES

①

Marketing Team

What has our department done or what are we going to do to move us towards our company goals?

Launching new PDF lead generator, 5 Ways to Improve Your Dog's Health, and hosting a webinar on 3 Tips to Get Your Dog to Stop Barking at the Door.

How did we add value to our customers last week?

We hosted a free webinar to educate customers on the importance of grain-free dog food. 342 people attended and we've already seen an increase in subscriptions.

How are we adding value for our customers this week?

Sending out early bird buy-one-gift-one offer for the new Online Dog Training Program to our current dog food subscribers.

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Sales Team

What has our department done or what are we going to do to move us towards our company goals?

We made outbound calls to 10 veterinarian offices and created two new partnerships. Nancy will be meeting with both offices this week.

How did we add value to our customers last week?

We hosted a Q&A call with veterinarian to answer any questions about what it looks like to partner with us.

How are we adding value for our customers this week?

We will be reaching out to current veterinarian partners to offer them the buy-one-gift-one offer for the new Online Dog Training Program.

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Media Team

What has our department done or what are we going to do to move us towards our company goals?

We filmed a new promo video for the Online Dog Training Program and finished editing all modules for the course.

How did we add value to our customers last week?

We produced the webinar and Q&A call last week. Customer Experience has received many messages about how great the quality was for both.

How are we adding value for our customers this week?

We'll be creating social snippets for Instagram to give our customers a sneak peek of what's inside the Online Dog Training Program.

COMPANY PRIORITIES

BY _____

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DEPARTMENT UPDATES

①

What has our department done or what are we going to do to move us towards our company goals?

How did we add value to our customers last week?

How are we adding value for our customers this week?

②

What has our department done or what are we going to do to move us towards our company goals?

How did we add value to our customers last week?

How are we adding value for our customers this week?

③

What has our department done or what are we going to do to move us towards our company goals?

How did we add value to our customers last week?

How are we adding value for our customers this week?

The Leadership Meeting

Notes

The Leadership Meeting gives your leadership team a chance to connect and talk about how each of their departments are working together to accomplish the three primary objectives.

Key Takeaways:

As the leader you want to make sure that, week after week, each department is working on the highest return opportunities.

Repeat these three questions for each department:

1. What big initiatives are happening this week?
2. Is there anything blocking these initiatives?
3. Who is responsible for completing each task?

Reflection Questions for You or Your Team:

1. Who needs to be in your Leadership Meeting?

2. How often will you meet?

3. How will this meeting keep your business moving forward?

4. What kind of questions do you want to ask and answer during the Leadership Meeting?

What big initiatives are happening this week?

Choose one of the department leaders to give a quick update on any big initiatives that are happening.

Is there anything blocking these initiatives?

Use this time to address bottlenecks.

Who is responsible for completing each task?

When a specific person takes responsibility for a specific task, those tasks are more likely to get done.

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What big initiatives are happening this week?

Is there anything blocking these initiatives?

Who is responsible for completing each task?

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What big initiatives are happening this week?

Is there anything blocking these initiatives?

Who is responsible for completing each task?

③

What big initiatives are happening this week?

Is there anything blocking these initiatives?

Who is responsible for completing each task?

Leadership Meeting

LEADER FOR THIS MEETING

Ted Barker

① Marketing

What big initiatives are happening this week?

Launching PDF lead generator, hosting webinar on 3 Tips to Get Your Dog to Stop Barking at the Door, and sending out early bird offer for Online Dog Training Program.

Is there anything blocking these initiatives?

The keynote still needs to be created and designed for the webinar on Thursday and the discount code for the early bird offer needs to be set up.

Who is responsible for completing each task?

The content team will send the keynote outline to the design team by Tuesday so the design team can deliver the keynote by Wednesday. Development will set up the code.

② Sales

What big initiatives are happening this week?

Nancy is meeting with our new veterinarian partners this week and we are offering the early bird offer for the new Online Dog Training Program to all existing partners.

Is there anything blocking these initiatives?

We are also waiting on the development team to set up the early bird offer code.

Who is responsible for completing each task?

Development team will finish setting up the offer code and send it to the marketing team and the sales team by Wednesday.

③ Media

What big initiatives are happening this week?

We are creating social snippets that give an inside look at the Online Dog Training Program and will start editing the new promo we filmed last week.

Is there anything blocking these initiatives?

No blockers!

Who is responsible for completing each task?

Sandra will be working on the social snippets and Miles will be working on the new promo video.

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What big initiatives are happening this week?

Is there anything blocking these initiatives?

Who is responsible for completing each task?

② _____

What big initiatives are happening this week?

Is there anything blocking these initiatives?

Who is responsible for completing each task?

③ _____

What big initiatives are happening this week?

Is there anything blocking these initiatives?

Who is responsible for completing each task?

The Department Stand-up

Notes

The Department Stand-up Meeting gives team members the direction and feedback they need every day to know they are working on the right things.

Key Takeaways:

- Each department leader leads their Department Stand-up
- The Department Stand-up needs to happen almost every work day
- The purpose of the Department Stand-up Meeting is to make sure each team member fully understands what role they play within their department
- This meeting template is going to be filled out by every single team member and will be adjusted and edited continually throughout the week

Reflection Questions for You or Your Team:

1. How will this meeting help keep you and/or your team focused?

2. Are your leaders clear on what their team members need to be working on each week? If not, how will you make sure they are?

Department Stand-up

NAME

DATE



**My Five
Priorities**



**What I
Completed**



**What's
Up Next**



**Where I
Am Blocked**

My Five Priorities	What I Completed	What's Up Next	Where I Am Blocked

What I Completed:

A great way to keep each team member accountable to make progress on their tasks, give encouragement to those who are getting work done, and allow the team leader to better understand where each project stands.

What's Up Next:

Helps each team member break down their big projects into next steps and know what to do when they finish a task.

Where I Am Blocked:

Gives each team member an opportunity to ask for help and get answers on items that may be preventing them from completing their tasks.

Department Stand-up

NAME

Stanley Cafe

DATE

April 15th

<p>!</p> <p>My Five Priorities</p>	<p>✓</p> <p>What I Completed</p>	<p>→</p> <p>What's Up Next</p>	<p>⊘</p> <p>Where I Am Blocked</p>
<p>Write copy for 2 lead generators by April 28th</p>	<p>Finished content outline for lead generator #2</p>	<p>Start writing the copy for lead generator #2</p>	<p>N/A</p>
<p>Write email copy for webinar #1 by April 20th</p>	<p>N/A</p>	<p>Need to get webinar content from content team</p>	<p>Waiting on content from content team</p>
<p>Write email copy for webinar #2 by May 1st</p>	<p>N/A</p>	<p>Need to get webinar content from content team</p>	<p>Waiting on content from content team</p>
<p>Write 6 Instagram captions for Online Dog Training Program by May 1st</p>	<p>Finished writing captions for Instagram</p>	<p>Deliver captions to social media intern</p>	<p>N/A</p>
<p>Write email copy for Online Dog Training Program by May 5th</p>	<p>Wrote the first two emails</p>	<p>Need to finish writing the last four emails</p>	<p>N/A</p>

Department Stand-up

NAME

DATE



**My Five
Priorities**



**What I
Completed**



**What's
Up Next**



**Where I
Am Blocked**

My Five Priorities	What I Completed	What's Up Next	Where I Am Blocked

Personal Priority Speed Check

NAME

Company Priorities:

Reminds each team member what the story is about and helps them align their work with the overall objectives of the business.

COMPANY PRIORITIES

BY _____

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MY DEPARTMENT'S TOP PRIORITIES

Time-bound • Measurable • Specific

1. _____
2. _____
3. _____
4. _____
5. _____

MY PERSONAL PRIORITIES

Timebound • Measurable • Specific

1. _____
2. _____
3. _____
4. _____
5. _____

MY DEVELOPMENT PRIORITIES

1. _____
2. _____
3. _____

My Department's Top Priorities:

Reminds them how their department directly contributes to the overall objectives of the business.

My Personal Priorities:

Gives the team member an opportunity to define what they believe is the most important use of their time to help accomplish the department's priorities.

My Development Priorities:

Look for opportunities for each team member to get better and stronger.

Personal Priority Speed Check

NAME Stanley Cafe

COMPANY PRIORITIES

BY January 1, 2023

①

Sell 1,000 Dog Food Subscriptions

②

Partner With 100 Veterinarian Offices

③

Reach 500 Pet Owners With Online Dog Training Program

MY DEPARTMENT'S TOP PRIORITIES

Time-bound • Measurable • Specific

1. Develop 2 lead generators for food subscription service by end of quarter
2. Host 2 webinars for pet owners by end of quarter
3. Host 2 webinars for veterinarian by end of quarter
4. Increase social media following by 25% by end of quarter
5. Develop sales funnel for Online Dog Training Program by May 25th

MY PERSONAL PRIORITIES

Timebound • Measurable • Specific

1. Write copy for 2 lead generators by April 28th
2. Write email copy for webinar #1 by April 20th
3. Write email copy for webinar #2 by May 1st
4. Write 6 Instagram captions for Online Dog Training Program by May 1st
5. Write email copy for Online Dog Training Program by May 5th

MY DEVELOPMENT PRIORITIES

1. Read Marketing Made Simple by J.J. Peterson and Donald Miller
2. Find a mentor and meet once a month
3. Attend StoryBrand Marketing Workshop

COMPANY PRIORITIES

BY _____

①

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③

MY DEPARTMENT'S TOP PRIORITIES

Time-bound • Measurable • Specific

1. _____
2. _____
3. _____
4. _____
5. _____

MY PERSONAL PRIORITIES

Timebound • Measurable • Specific

1. _____
2. _____
3. _____
4. _____
5. _____

MY DEVELOPMENT PRIORITIES

1. _____
2. _____
3. _____

The Quarterly Performance Review

Notes

In your Quarterly Performance Review you are going to answer a very specific question burning in the minds of each team member. That question is: How am I doing?

The Quarterly Performance Reviews are about improving performance.

Key Takeaways:

- These meetings should only last 30 minutes.
- One of the reasons we want to make priorities time-bound, measurable, and specific is so that we all stay accountable to the things we said we'd do.
- These meetings are held once each quarter and, for the most part, are positive.
- The main point of this meeting is not to praise or reprimand each team member, but rather to give them a crystal clear focus of the department leader's view of their performance.
- Each performance review is a chance to improve performance, not judge the team member.

Reflection Questions for You or Your Team:

1. How will this meeting help team members know how they are doing?

2. How will you make sure these meetings feel safe and constructive?

Each team member and each department head will fill this out for the meeting.

Quarterly Performance Review

NAME

Personal Priorities:
The conversation will revolve around the team member's five personal priorities and whether they met, exceeded, or did not meet expectations.

PERSONAL PRIORITIES	EXCEEDED	MET	DIDN'T MEET
#1: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#2: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#3: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#4: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#5: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next Opportunities:
Use this section to talk about what opportunities the team member has in the next quarter. This could be opportunities for improvement, growth, etc.

Came prepared to Personal Priority Speed Checks?

NEXT OPPORTUNITIES

Quarterly Performance Review

 NAME **Stanley Cafe**

PERSONAL PRIORITIES

	EXCEEDED	MET	DIDN'T MEET
#1: Write copy for 2 lead generators by February 28th Comments Completed both lead generators by February 25th	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
#2: Write email copy for webinar #1 by April 20th Comments I wrote and delivered the email copy for webinar #1 by April 10th. The emails performed well and resulted in our highest webinar attendance to date.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#3: Write email copy for webinar #2 by May 1st Comments Due to other blockers, I was not able to hit this goal. I delivered the email copy on May 15th instead of May 1st.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
#4: Write 6 Instagram captions for Online Dog Training Program by May 1st Comments I finished the Instagram captions ahead of schedule and delivered them by April 15th. The posts generated over 100 new followers during the campaign.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#5: Write email copy for Online Dog Training Program by May 5th Comments I hit this goal and submitted the email copy by May 1st.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Came prepared to Personal Priority Speed Checks?



NEXT OPPORTUNITIES

- Write lead generator for veterinarian office partnerships
- Write captions for 6 Instagram posts promoting the Online Dog Training Program
- Review existing email campaigns and increase conversion rates

Quarterly Performance Review

NAME

PERSONAL PRIORITIES	EXCEEDED	MET	DIDN'T MEET
#1: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#2: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#3: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#4: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
#5: Comments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Came prepared to Personal Priority Speed Checks?	<input type="checkbox"/>	<input type="checkbox"/>
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NEXT OPPORTUNITIES

Installing the Management and Productivity Made Simple Playbook

After installing the playbook, your business will transform.

- Everybody will know what the business is trying to do.
- Everybody will know what their role is.
- Everybody will know why they matter.
- Morale and revenue will go up together.

Notes

Key Takeaways:

- Your team wants to be invited into an important story in which they play an important role
- Installing the playbook will significantly free up time for your leaders
- Other meetings for the annual calendar:
 - **Monthly Revenue Meeting:** Discuss how much money the company made the previous month and why you did or did not succeed in meeting expectations
 - **War Rooms:** A special meeting in which you are trying to gain fast ground on a project
 - **Leadership Catchall:** A chance for whoever is running your company to ask the questions they need to ask to gain the clarity they need to move the company forward

Ways to Start Using the Playbook:

- Hold a War Room to explain the entire playbook to your leadership team
- Establish the timeline you will use to roll out the playbook
- Start holding the All-Staff Meeting
- Add Leadership Meetings
- Add Department Stand-ups
- Add Personal Priority Speed Checks
- Add Quarterly Performance Reviews

Reflection Questions for You or Your Team:

1. When will you hold a War Room to explain the playbook to your team?

2. Which parts will be the easiest to implement immediately?

3. Which parts will require more thought?

4. What will your company look like a year from now if you install the Management and Productivity Playbook?



**Business
Made
Simple**