



The Workday Mastery Toolkit

Workbook

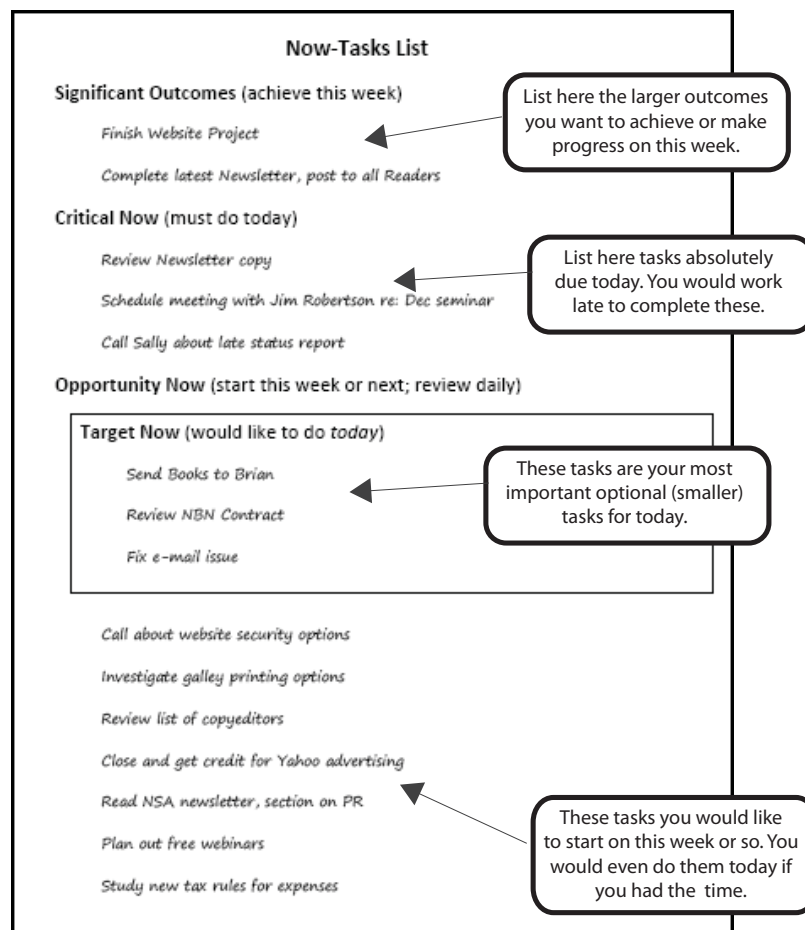
Based on the book *Master Your Workday Now!*
by Michael Linenberger

Tools from Part I: Controlling Your Workday Now

Now Tasks List

The Now Tasks list is a form showing a one-page list of all the tasks you need to be thinking about in your workday. It was introduced in Chapter 2 of the book, and expanded on in later chapters. By the end of Part I the Now Tasks list included three urgency zones: Critical Now, Opportunity Now, and Target Now (all covered in Chapter 6), as well as the Significant Outcomes section at the top (discussed in Chapter 7).

Here is a sample of the full Now Tasks List (from the Level 3 templates), with notes on how to use each section on the form.



Now Tasks List

Significant Outcomes (achieve this week)

Critical Now (must do today)

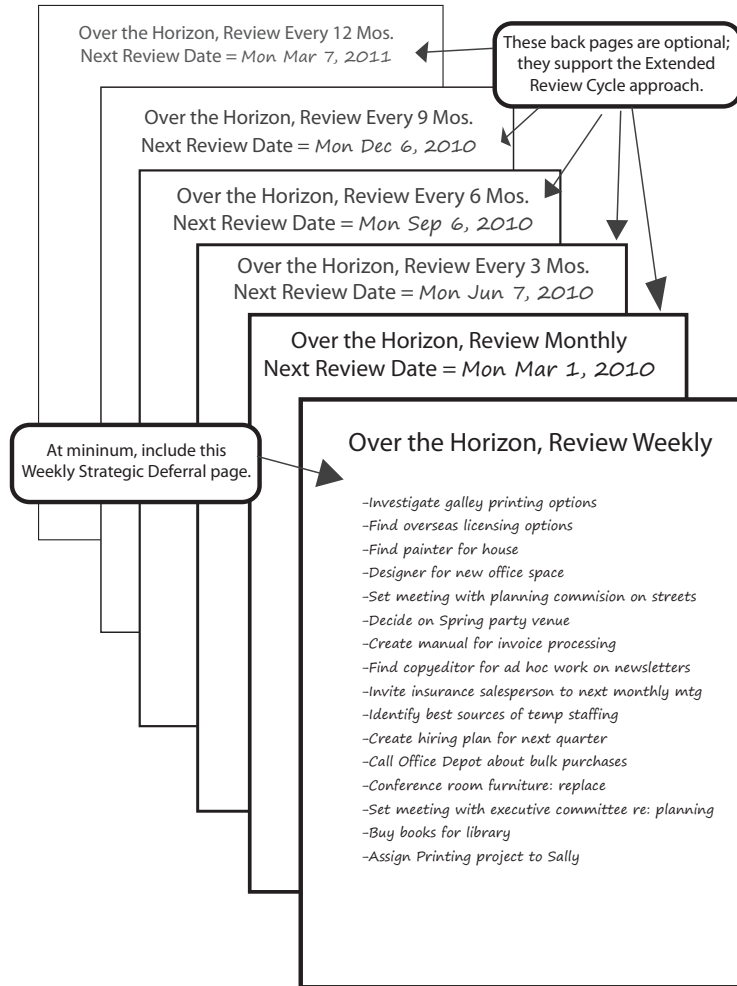
Opportunity Now (start this week or next; review daily)

Target Now (would like to do today)

Over-the-Horizon List for Defer-to-Review Tasks

In Chapter 6 you learned about the Strategic Deferral process, and specifically, Defer-to-Review tasks. You put Defer-to-Review tasks on the Over-the-Horizon pages. At its simplest, you use one page that you review weekly. Better, though, is to use the Level 3 templates, which include five additional pages to support the extended-review-cycle approach; that is shown below. As you can see, each added page has a longer review cycle.

Here is a sample of a completed Level 3 set, with notes indicating the optional pages.



Over the Horizon (Review Weekly)

Over the Horizon, Review _____

Next Review Date = _____

Tools from Part II: Creating Your Workday Now

In Part II: Creating Your Workday Now, you learned how to create Now Goals. Most of Part II was dedicated to the 4-step Now Goal creation process. Here are the four steps again.

- Step 1: Create your Vision Goal. As you know by now a Vision Goal is essential. I showed you in Chapter 10 a simple formula to create it.
- Step 2: Identify your Target Goals and add them to the Vision Goal. Nearly all goals need a Target Goal component, and Chapter 11 showed some fine points on adding them. Once you've added them, you will have the two core pieces of your new Now Goal statement.
- Step 3: Activate the Now Goal. This is just as important as writing a good Now Goal statement, and the most important ongoing step after initially creating the goal. Chapter 12 presented a thorough explanation of why it was needed and how to do it.
- Step 4: Take first action. This is where you start to engage your goal. Chapter 13 covered how to do that. One option is to brainstorm a few actions for each goal, ideally using a mind map. Another option, for larger goals, is to create a small project plan (timeline).

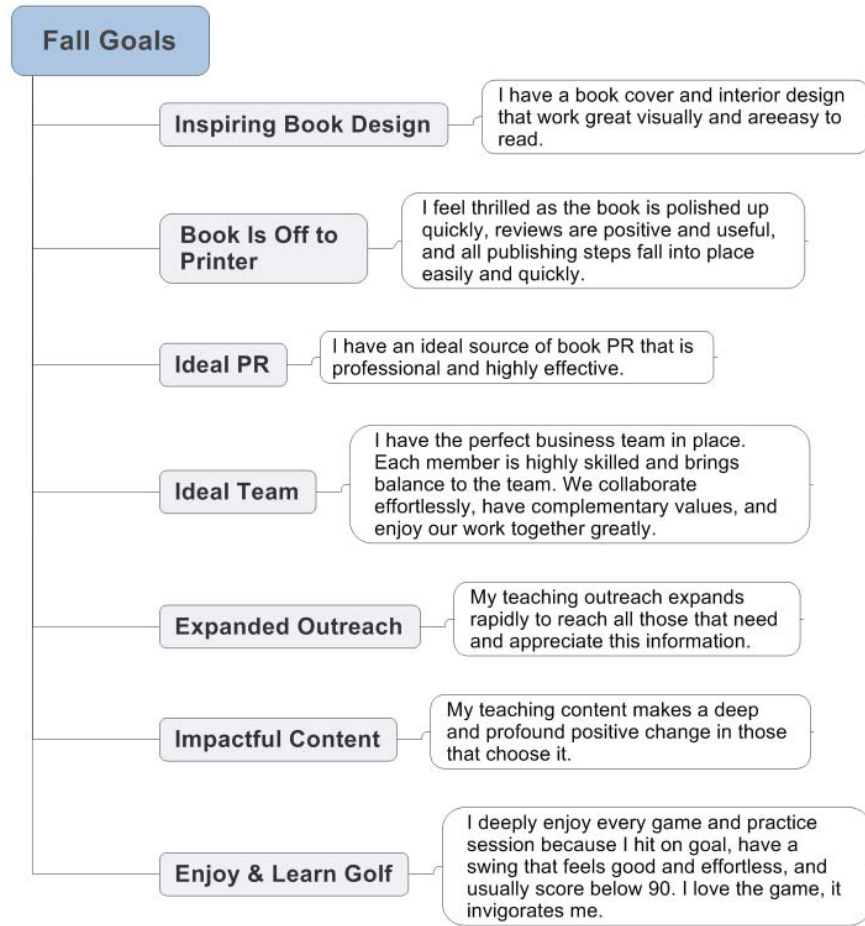
At the end of these steps you typically ended with a list of Now Goal statements, which you activated all in one sitting. And Chapter 14 provided you with an optional exercise to help expand your beliefs about what you are able to accomplish, to help you set your sights on tougher goals.

On the pages that follow are samples of a Now Goal statements list, a first action brainstorming list, and a project plan, as well a sample Locking in New Beliefs statement and a generic list you can use in creating your own Locking in New Beliefs statement.

The Now Goal samples below were created using MindManager software, which I discuss in Chapter 13. However, you could create these in nearly any word processing application, or by hand. Templates for MindManager and Microsoft Word are included on my website, MasterYourWorkday.com/ToolDownloads.

Now Goal Statements List

It is helpful to list all your smaller goals on one page so that you can activate them one after the other. One idea presented in Chapter 11 was to recreate this list each season with new goals you are working on and hope to complete that season. Here is a sample of one such page.



Now Goal Action Brainstorming

In Chapter 13 I discussed optionally brainstorming actions. Here is one way that might look using the same goal form as above, just adding some action topics to the right of the goal.



Now Goal Action Planning

In Chapter 13 I also discussed optionally creating a project plan (timeline) for the steps of a much larger goal. Here is how that might look. I used the optional JCVGantt add-in module for MindManager to convert the MindManager topics directly into a linked project schedule. You can of course use any application that creates timelines, like Microsoft Project, or even manually create a timeline in a graphics application or Microsoft Excel.



Goals For Period _____

Goal Name

Goal Statement

Actions

Locking in New Beliefs Example

Chapter 14 in Part II was about expanding your beliefs such that you can take on bigger goals. I showed you how to create a list of ways that your Workday Now and personal life might change once those new beliefs or goals were in place. Reviewing that list daily during your goal activation process helps your subconscious embrace your larger capabilities.

Here is a sample of one such page.

1. *My paycheck: Nicely larger this month!*
2. *My calendar or time: My clients are calling me, wanting to buy. I have sales meetings with them scheduled on my calendar. I have many closing meetings scheduled on my calendar. (Picture that.)*
3. *Attitude of my boss to me: "Ted, good job—keep it up. You are an example to all of us!"*
4. *Comments from my colleagues: "Wow, Ted, what's your secret? Can you show me how to do some of this?"*
5. *Conversations I have with most others about the new success: "Yeah, sales are good. My contacts are all paying off. Most of my calls are closing; people just seem to want to do business with me. You guys can do this too—just envision how you want your sales to go, and then do the work."*
6. *How my family is reacting: (Describe a positive reaction when you tell them, or when you take your spouse out to dinner or off for a weekend.)*
7. *My feelings: It sure feels good to have a solid increase in sales. I like being in this comfort zone, knowing that I am set and in the flow. It feels like every contact I make just comes through.*
8. *My expectations: These sales will continue to keep closing; I am on a roll and all the pieces continue to fall into place to close increasing numbers of sales. I just have to speak, and the sale closes, and this will continue into the future; this is amazing! I have now come to expect this with all contacts; it feels so natural for it to happen.*
9. *My attitude: I am hugely upbeat. It is amazing how success at work affects all aspects of my life, including my attitude about life. I enjoy my weekends more, knowing I have met and exceeded goals all week. I feel comfortable taking time off for play.*
10. *E-mails to me: I am getting 10 to 20 new sales responses per day by e-mail. Whenever I look at my in-box, there they are.*
11. *My activities: I am helping with delivery of the sales, doing follow-ups, and filling out the forms. I am making sure production is on track for the sales. I am calling prospects, and the calls work. I will also be coaching junior sales folks on how to do this.*

Locking in New Beliefs Generic List

Here is a generic list of the most common aspects of work and life that might change that you can use to create your own such page if you like.

Downloadable templates of this generic list are available at my website, MasterYourWorkday.com/ToolDownloads

- *My attitude:*

- *My expectations:*

- *My conversations:*

- *My calendar:*

- *My bank account:*

- *My spending:*

- *My income:*

- *My calendar:*

- *My self-talk:*

- *My feeling when I wake up in the morning:*

- *My thoughts when I go to sleep at night:*

- *My thoughts when I walk in front of a mirror:*

- *My thoughts when I see my co-workers:*

- *My thoughts when I consider my boss:*

- *E-mails I get from others:*

- *Phone calls I get from others:*

- *(Add anything else specific to the topic)*

Tools from Part III: Connecting Your Workday Now

In Part III: Connecting Your Workday Now, you learned how to create a life's work vision statement that you will activate daily. Most of Part III was dedicated to the background for building that statement, culminating in Chapter 18 where you created it. Then in Chapter 19 I discussed creating a short personal mission statement, one you can optionally create. Below are samples of each.

Life's Work Vision Statement

In Chapter 18 you learned how to design and create a life's work vision statement, which you will use to activate your life's work vision every day. Here is a sample of one of these.

I am a master dessert chef and menu designer for a well-known, high-end restaurant chain. The restaurant chain is widely recognized for its creative cuisine and is located in most major cities (example: P.F. Chang's). I create the delicious dessert ideas that are placed on the nationwide selection. I am quite famous in the restaurant industry and among restaurant critics, and both praise my creative and distinctive approaches to well-known dishes. As a result, the restaurant receives awards often, and I am recruited regularly from competing chains. I enjoy a generous salary (at least \$80,000) and receive stock options worth \$10,000 each year. I adore my job—I feel like I have the best job in the world!

The personal life my job enables is perfect. I live and work in or near one of these cities: New York City, San Francisco, Chicago, or Atlanta. My job enables me to have a delightful home that is at least 2,500 square feet in size, is located in a tree-lined suburban neighborhood, and is near good schools for my family. Since my job is mainly designing menus and not daily cooking, I am able to keep excellent work hours and have weekends off for fun with my family and friends. I am able to lead a balanced life with fun exercise, healthy and tasty meals, and exciting outdoor activities like bicycling, which I love.

The job gives me a lot of creative freedom. When I want to, I can choose to cook in any of the chain's restaurants, so I can enjoy the experience and gain insight into new menu ideas. I have a number of people reporting to me, so I can offload less interesting work and focus on new menu ideas. I take quarterly travel to a central training facility, where I train regional chefs on new dessert menus and receive feedback on existing menus. I am able to create new dishes often, and management gives me free rein to be as creative as I wish. I have a generous budget to experiment with. I also have a travel budget to take "tasting trips" three or more times a year, where I try out desserts at excellent restaurants in various interesting locations, including overseas—I love these trips.

Overall, I have what has to be the best job I can imagine. I am doing the things I love—creating fabulous new desserts—and am doing it in a way that brings me national recognition. In doing so, I am providing a delightful dessert experience for thousands of people, making them all a little happier each time.

Personal Mission Statement

In Chapter 19 I discussed creating a personal mission statement. Your personal mission represents your highest and most general vision or purpose that captures what you were born to do. Your mission is an ultimate sense of purpose that includes all the various visions and larger purposes you have pursued and will likely pursue over the years. The four core qualities of a personal mission are that it is 1) permanent, 2) always positive, 3) very general, and 4) usually discovered later in life. Creating one is purely optional.

Here is my personal mission statement, as a sample.

Helping large numbers of people uplift and achieve their life's goals and dreams through their work.