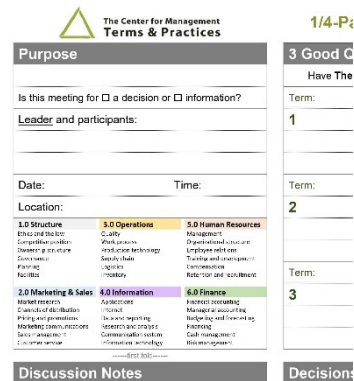


1/4-PAGE MEETING PLANNER

Early in my career, my boss scolded me for not having questions ready for a big meeting. He said, "If you think you have all the answers at the start of the meeting, what's the point of meeting?" Good questions are what drives creativity and genuine collaboration. – Derrick Van Mell, CEO, CMTF

Be the meeting hero

Abraham Lincoln said if he was going to meet someone for an hour, he'd spend three hours preparing. Thanks, Abe, but who's got the time? The 1/4-Page Meeting Planner will quickly earn you the reputation of always asking *the* critical question. And asking great questions is what it means to be servant leader and trusted advisor.



The image shows a thumbnail of the 1/4-Page Meeting Planner form. It includes a header with the Center for Management Terms & Practices logo and the text '1/4-P:'. The form has several sections: 'Purpose', 'Is this meeting for a decision or information?', 'Leader and participants', 'Date', 'Time', 'Location', a grid of business categories (1.0 Structure, 2.0 Marketing & Sales, 3.0 Operations, 4.0 Information, 5.0 Human Resources, 6.0 Finance), 'Discussion Notes', and 'Decisions'. On the right side, there are three numbered boxes labeled '3 Good Q' and 'Have The' with lines for writing.

Benefits: Focus everyone's time

The Center's tools are used with The Index to minimize omissions, improve communications and foster collaboration. In addition, the **1/4-Page Meeting Planner**:

- Turns meetings into collaborations for solutions, not competitions for positions
- Radically cuts preparation time
- One good question can eliminate the need to meet again

Difficulty	Easy
Estimated time required	15 minutes, tops
Special skills	None

Instructions: It's all about the questions

Get the PDF at the top of The Toolkit page. Review the last meeting's notes, research the issues and think about the people.

1. Scan The GM Index at www.theindex.net for 3 terms relevant to the meeting
2. Borrow or improve on the 3 Good Questions provided in each term
3. Make sure the Purpose statement is just right
4. Take good notes and then record them in your CRM
5. Be prepared for people asking you to show off the Planner!

contact the Center for assistance: info@theindex.net

Make it better!

Members should share ideas for improving any of the Center's tools and how they're taught and formatted. It's also great to suggest new applications or brand-new tools.



Purpose

Is this meeting for a decision or information?

Leader and participants:

Date:

Time:

Location:

1.0 Structure

Ethics and the law
Competitive position
Ownership structure
Governance
Planning
Facilities

3.0 Operations

Quality
Work process
Production technology
Supply chain
Logistics
Inventory

5.0 Human Resources

Management
Organizational structure
Employee relations
Training and development
Compensation
Retention and recruitment

2.0 Marketing & Sales

Market research
Channels of distribution
Pricing and promotions
Marketing communications
Sales management
Customer service

4.0 Information

Applications
Internet
Data and reporting
Research and analysis
Communication system
Information technology

6.0 Finance

Financial accounting
Managerial accounting
Budgeting and forecasting
Financing
Cash management
Risk management

-----first fold-----

Discussion Notes

Did we agree on the terms in **The GM Index**?

-
-
-
-
-
-
-
-
-
-

Continued on back

The top three ★

3 Good Questions

Have **The GM Index** open: www.theindex.net

Term:

1

Term:

2

Term:

3

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Decisions and Tasks

1

2

3

4

5

6

- Did this meeting fulfill its purpose?
- Did we distribute and file the notes?