

A close-up photograph of a person's hands using an axe to carve a piece of wood. The person is wearing a blue long-sleeved shirt. The background is a blurred forest setting with trees and foliage. The text is overlaid on the image in white, bold, sans-serif font.

SELF LEADERSHIP

HOW TO LEAD
THE MOST DIFFICULT PERSON IN YOUR LIFE



DEVELOPMENT
AND LEADERSHIP COACHING

Our Time Together



- How to adopt the right mindset to be intentional about your use of time and energy in today's world
- A specific framework for managing a massive amount of information, projects, and tasks
- Grow in your ability to connect great planning to ongoing implementation
- Know where to put your efforts for the greatest results
- Understand the specific methods you can use to maximize your personal capacity as a leader
- Grow in your ability to lead yourself to a great level of effectiveness

“You get no credit for doing the wrong things well.”

Mark Miller

THE MINDSET

This is *not* normal!

“And David shepherded them with integrity of heart;
with skillful hands he led them.”

Psalms 78:72

We have different gifts, according to the grace given to each of us. If your gift is prophesying, then prophesy in accordance with your faith; if it is serving, then serve; if it is teaching, then teach; if it is to encourage, then give encouragement; if it is giving, then give generously; **if it is to lead, do it diligently**; if it is to show mercy, do it cheerfully.

Romans 12:6-8

YOUR VALUE VS. THE VALUE YOU ADD



Time and Energy

People and Resources

THE METHODS

THE POWER OF PLANNING

THE POWER OF LISTS

THE POWER OF RAPID SUCCESS

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ONE PAGE STRATEGIC PLAN

Priority



Strategies



Operational Objectives



ONE PAGE DEVELOPMENT PLAN

Priority

Secure \$1 million in new gift commitments and grow a culture of generous giving

Strategies

Grow a major donor development approach to advance our impact in a sustainable way

Launch a Task Force to grow major donor relationships

Grow our network and major donor support in our region

Establish a simple, contemporary approach to communications well integrated with our vision and message

Establish partnerships that expand our reach and awareness.

Equip staff and volunteers to communicate the message and grow relationships effectively

Operational Objectives

Amazing donor and thanking support

Communication excellence

Face to face donor development

Consistent public relations

Strategic teams, task forces and councils

Internal scoring through ongoing metrics and reporting

Creating strong volunteer community

Excellent promotion and events

Grow solicitation efforts

Managing budget

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All Notes

@Horizons

▼ Reminders

Add a reminder to @Horizons

Great people to keep an eye on

100 Day Goals

Updated

Title

10/21/16, 9:56 PM

Example Responsibilities and Proje...

10/21/16, 9:05 PM

Example Stop Doing List

10/21/16, 11:09...

Weekly Review Checklist

9/6/16, 6:44 AM

Model Week Updated September 6...

10/21/16, 10:54...

Great people to keep an eye on

10/21/16, 11:56...

Planning 2016

9/11/16, 10:27 PM

Content to create

7/1/15, 1:41 PM

Purpose and Principles

10/21/16, 11:11...

Our Vision

10/21/16, 11:13...

100 Day Goals

10/21/16, 11:17...

Areas of Focus and Key Responsibi...

10/21/16, 11:18...

2016 Projects

Created: Oct 21, 2016 Updated: Oct 21, 2016

Example Responsibilities and Projects List

Example Areas of Key Responsibilities

1. Self Leadership
2. Leadership, Vision, Values, Strategy, Financial Health
3. Growing Giving
4. Developing our Leadership Team
5. Managing Relationships with our Board and Top Donors

Example Projects List for 2016 (in no particular order)

1. Hiring a Manager
2. ~~Speaking at Snow Tire Michigan Lutheran Schools event (February 4)~~
3. ~~Speaking at February Lutheran Schools Conference (ALMA) (delegated to Sarah)~~
4. ~~Speaking at British Columbia conference (March 1)~~
5. Strategic Partnership with Southeast Region of ACSI (online resources)
6. ~~Lutheran Schools event March 16-18 in Las Vegas~~
7. ~~Trip to see Robert D with Greg~~
8. Anniversary Trip with Paula
9. ~~Establishing second (and maybe third) corporation~~
10. Investing time and capacity to get our systems organized for growth
11. ~~Advisory Board (next Meeting April 15)~~
12. ~~Strategic partnership/product planning with partner organizations~~
13. Strategic Planning for company (January through February, for 2017-2020)
14. ~~Speaking at Van Lunen Center (July)~~
15. Book Legacy with Bill L.
16. ~~Marketing Division with Sarah Stanfield~~
17. Seminar discussions with Lindsay
18. Launching new coaches in 2016
19. Devotions and Prayer with Paula and Nathan
20. Content Improvement
21. Systems and Procedures for the company

Reminders

[Add a reminder to @Horizons](#)

Great people to keep an eye on

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10/21/16, 9:56 PM	Example Responsibilities and Proje...
10/21/16, 9:05 PM	Example Stop Doing List
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10/21/16, 11:17...	Areas of Focus and Key Responsibi...
10/21/16, 11:18...	2016 Projects

Created: Oct 21, 2016 Updated: Oct 21, 2016

Example Responsibilities and Projects List

24. Business Development
25. Relationship Management
26. Playbook/Workflow
27. Owner's Manual for our Business
28. The Robert D relationship
29. Monthly Financial Review (with Paula)
30. Consistent, high quality email marketing (@Delegate to S)
31. Event planning (Small groups? Cohen? Matush?)
32. Replicable Model for other Coaching -[how can we make this self-organizing?]
33. Planning for 2017
34. Personal and Professional Development Plan
35. Golf scheduling
36. Adventures with Nathan (Art, horses, mountain climbing, escape room, games)
37. Date nights with Paula
38. Time with Chris (movie, meals, car shows, races)
39. Possible Strategic Partnerships
40. Duck Hunting Trip for Nathan
41. Message Planning Meeting for CA
42. August Board Meeting for NC
43. Van Lunen Center planning
44. Podcasting by Zach (see notes in Evernote) my content and donor conversations
45. Content Marketing (see notes in evernote)
46. Grow relationship with WintersKing
47. Long-Term Family Financial Planning
48. Regional Ambassadors
49. Create a Donor Advisory Board
50. Client Advisory Board (virtual meeting?)
51. Strategic Partnership with WintersKing, explore planned giving training for organizations
52. ECFA relationship

Possible 2017 Projects

Created: Oct 21, 2016 Updated: Oct 21, 2016

Example Stop Doing List

What would my replacement do or not do?

What is the harder *right* thing to do?

- ☐ Stop working on projects or items on the fly, group time to work in advance
 - a. social networking, blog posts
 - b. scheduling meetings one at a time, do them in groups (assistant and me)
- ☐ Stop being the only person responsible for thanking and reporting
 - a. I should be monitoring our focus and involved in the highest impact way
- ☐ Have Assistant avoid scheduling appointments for prior to 9:00, or during lunch 11:30
- ☐ Don't respond to emails on the fly. Block a time during the day to respond. Assistant can text for more immediate responses needed
- ☐ Stop doing all follow-up myself, I need systems where assistant can do this
- ☐ Avoid meeting with staff without being scheduled in advance (except for S, T, J, and P)
- ☐ Stop going into conversations with staff without reviewing Agenda list for them
- ☐ Stop sending confirmation emails that you've received stuff.
- ☐ Stop letting others suggest places to meet, instead be proactive to suggest your preferred locations to minimize commute time.
- ☐ Stop taking unexpected/unscheduled phone calls unless during your interruptible time.

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Great people to keep an eye on

100 Day Goals

Updated	Title
Sep 6, 2016, 6:44 AM	Model Week Updated September 6 2016
Aug 16, 2016, 4:17 PM	Great people to keep an eye on
Sep 22, 2016, 10:28 PM	Planning 2016
Sep 11, 2016, 10:27 PM	Content to create
Jul 1, 2015, 1:41 PM	Purpose and Principles
Jul 1, 2015, 1:40 PM	Vision
Today, 2:35 PM	100 Day Goals
Today, 2:36 PM	Areas of Focus and Key Responsibilities
Today, 2:40 PM	2016 Projects

@Horizons



Horizon 3 - Goals



Share

Created: Jul 1, 2015

Updated: Oct 12, 2016

100 Day Goals

July 5 to October 13 2016

- 1) Launch the Founders Groups of Masterclass Membership and Grow—done
- 2) First draft of book complete
- 3) Successful launch of new pilot products—done
- 4) Complete upgrade to coaching content and coaches support
- 5) Integrate audience and contacts growth into our work as a team (referrals, phone calls, follow-up to content, weekly relationship building with contacts) —in progress
- 6) 185 Pounds—in progress 193

March 20 to June 28 2016

- 1) Improve contact to client conversion to 10%
- 2) Improve the content for coaching quality, build in resets along the way (Coaches playbook and integration with coaching content)
- 3) Improve the development planning process and framework
- 4) Support Paula in building solid and smooth workflow systems
- 5) Prepare to launch the Founders Group of the Masterclass Membership

Team 6x6
August 1-September 14

Becky

1. Manage promotion and execution of the Lisa project
2. Board member reunions
3. Plan and execute festivities
4. Build self-sustaining food volunteer team
5. Make screening calls for new Public Relations position applicants
6. Collect several *Magazine* recommendations and recruit spotlight donors through fall

Francine

1. Plan and execute winter 2012 *Magazine*
2. Write/edit content for all email communication, including newsletter
3. Support public relations through the writing of press releases, consistently integrating messaging from “Talking Points”
4. Gather information and write copy for fall editorial/advertorial commitments
5. See through the competition of next *Magazine*
6. Gather/delegate/write content for new website (pending new timeline)

Carol

1. Leadership Briefings: Promote (Lists/Invitations/Coordinate calls) and Execute
2. Vision Events: Promote (Lists/Invitations/Coordinate calls) and Execute
3. Enter and Receipt gifts, issuing weekly giving reports
4. Manage data entry volunteers for ongoing database updates
5. Implement system for establishing volunteer groups in database and issuing lists to volunteer leaders
6. Train and familiarize Frank with database, create his needed queries and review Master list data

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Blocking and Tackling Time

- ☑ Block the time that is not your own
- ☑ Block time for people and projects
- ☑ Block interruptible time
- ☑ Schedule meetings with yourself
- ☑ Establish themes for each day
- ☑ Tackle specific projects in 90 minute to 3 hours “chunks”
- ☑ Use a Model Week
- ☑ Use a 15-minute timer to tackle things that you dread or tend to procrastinate
- ☑ Eat “no’s” for breakfast
- ☑ Tackle the *resistance*.

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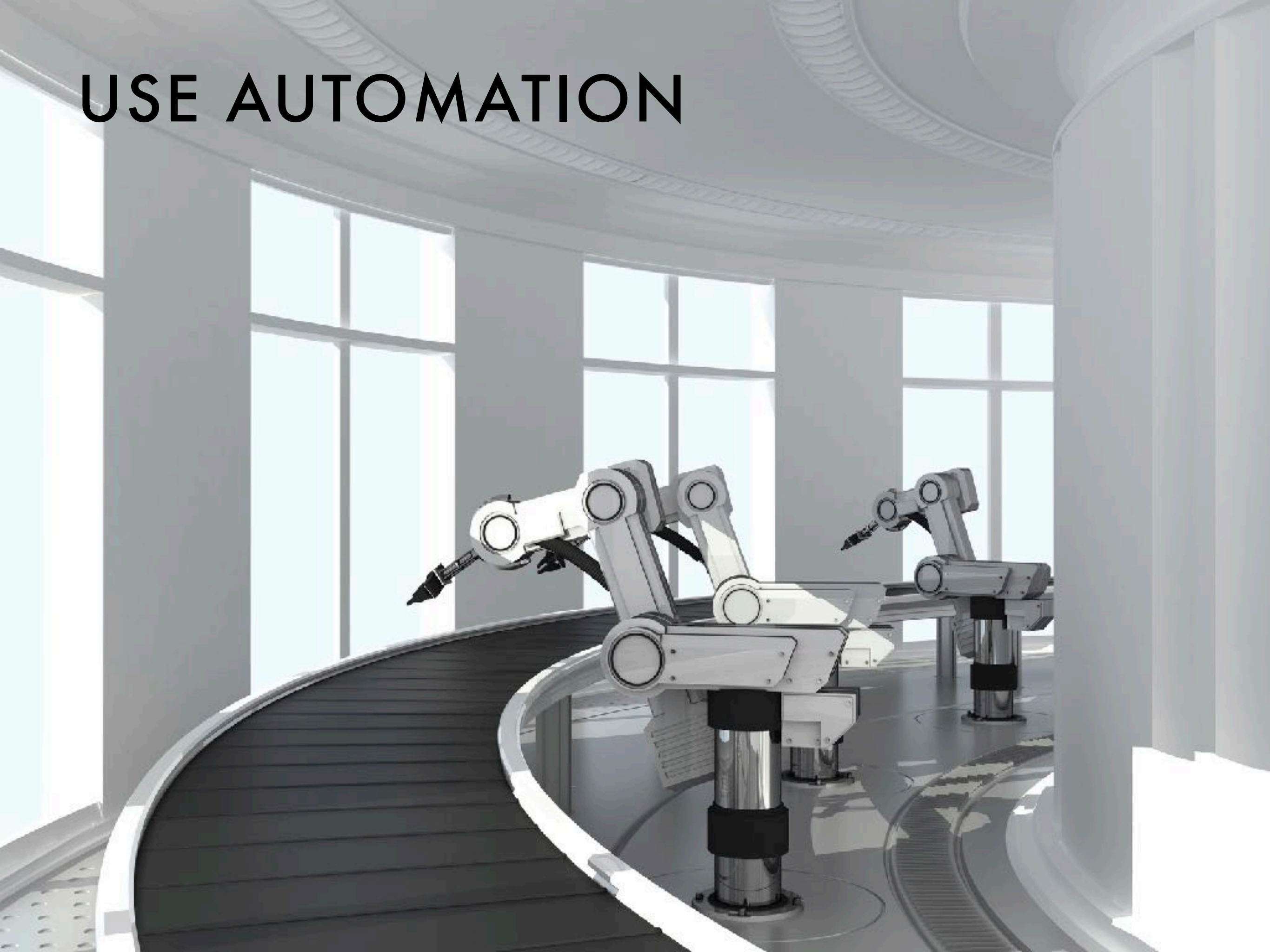


KILL THE HAMSTER

How to Kill the Hamster: Email Management

- ☒ Declare war on the enemy.
- ☒ Remember email is exponential.
- ☒ Rule #1 Don't Send It!
- ☒ Rule #2 See Rule #1.
- ☒ Track the time spent on email.
- ☒ Triage email.
- ☒ Use email templates.
- ☒ Use Boomerang or a scheduling tool.
- ☒ Limit email to 5 hours a week.

USE AUTOMATION



Using Automation

- ☒ Email templates (canned responses)
- ☒ Checklists for monthly reviews
- ☒ Checklists for ongoing meetings
- ☒ Anything that you do more than once
- ☒ Filters on Email
- ☒ [IFTT.com](https://ifttt.com) or Zapier
- ☒ Scheduled emails
- ☒ Establish processes for anything you do more than once
- ☒ Anything that you pay more than once
- ☒ Calendaring repeating events or processes (monthly, quarterly, or annual planning)
- ☒ Do video screencasts or videos to teach others the workflows they can do



USE DELEGATION

Using Delegation

- ☒ Identifying follow-up actions needed from meeting notes
- ☒ Following up with people to gather information, updates, or status updates
- ☒ Scheduling meetings
- ☒ Organizing files
- ☒ Checking voicemail and monitoring return call progress
- ☒ Preparing reports
- ☒ Meeting preparation using past notes
- ☒ Editing and proofreading
- ☒ Follow-up emails to meetings
- ☒ Transcribing key notes via dictation
- ☒ Execute key action items following meetings
- ☒ Reviewing, organizing, prioritizing email and correspondence
- ☒ Drafting basic correspondence

COACH OTHERS



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A large, white, irregularly shaped iceberg floats in the center of a dark blue ocean. The water around the base of the iceberg is a vibrant turquoise color. In the background, several other icebergs of various shapes and sizes are visible, some with blue-tinted edges. The sky is overcast with grey and white clouds. The text "DO-ING" is centered over the iceberg.

DO-ING

BE-ING

Leading Yourself

- ☒ Location, Location, Location
- ☒ Emotion follows Motion
- ☒ Mental vs. Physical vs. Spiritual
- ☒ Energizing vs. De-Energizing
- ☒ Craft a Training Plan
- ☒ Listen to Your Body
- ☒ Stop Lying to Yourself
- ☒ Implement a Recovery Plan
- ☒ Time alone with silence and the Lord

MY OWN RECOVERY PLAN:

A LITTLE BIT BETTER

- ☒ Listening to music
- ☒ Jumping jacks
- ☒ A short brisk walk outside
- ☒ A phone call to a friend
- ☒ A cup of tea
- ☒ Playing with kids
- ☒ Intense exercise
- ☒ Reading

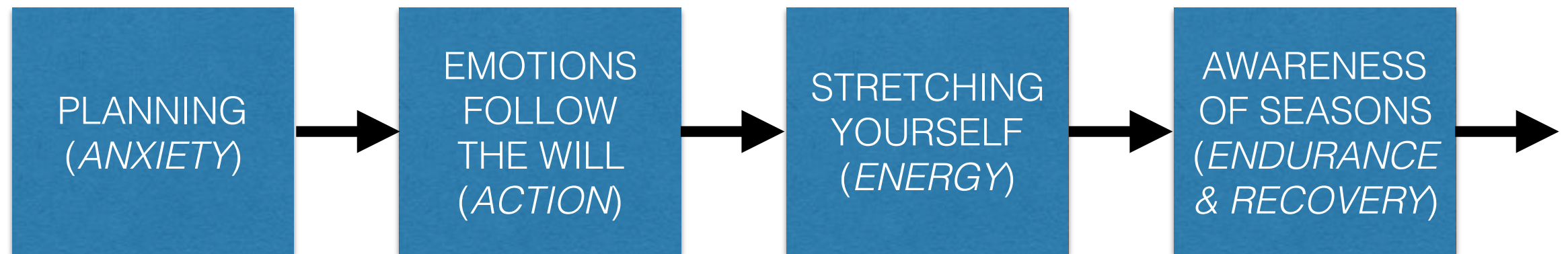
FILLS/DRAINS

- ☒ Fills: time with mentors and advisors, time with spouse, learning something new, exercise, journaling
- ☒ Drains: mediocre people, yard work, buying clothing, social networking, haircuts and doctors

WEEKLY ACTIONS

- ☒ 7 hours of sleep
- ☒ 1 hour for exercise
- ☒ Limit email and media
- ☒ Scheduled time for active fun
- ☒ Scheduled monthly think day
- ☒ 45 minutes is an hour

YOUR ALLY: GOOD STRESS



INVEST YOURSELF



The English Fleet, under the command of Drake, attacking the Spanish Armada.

A photograph of two people wearing aprons, preparing fresh vegetables on a wooden table. The person on the left is wearing a grey apron and is handling a large green leafy vegetable. The person on the right is wearing a brown apron and is using a knife to chop a purple vegetable. The table is covered with various fresh produce, including carrots, radishes, tomatoes, lemons, and a bowl of green leafy vegetables. The text "BRINGING IT ALL TOGETHER" is overlaid in the center of the image.

BRINGING IT ALL TOGETHER

Weekly Review Checklist

Preparation:

- ☒ Check email for actions, strip actions and defer and waiting for folders
- ☒ Check physical inbox
- ☒ Check digital inboxes
- ☒ Check voicemail and texts
- ☒ Check notebook
- ☒ Check calendar from previous week

Identifying Actions:

- ☒ Check Life Plan notes
- ☒ Check Annual Plan
- ☒ Check 100 Day Goals/6x6
- ☒ Check Projects list
- ☒ Check Model Week
- ☒ Schedule next six weeks, include project time
- ☒ Schedule Read-Review time
- ☒ Delegate, Delete, Defer

FINAL QUESTIONS & ANSWERS

ZACH CLARK

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developmentandleadership.org/scsbc-2017/

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