

MANAGER'S MEETING GUIDE

PLANNING AND SCHEDULING: WHAT'S THE DIFFERENCE?

BEFORE YOUR TRAINING MEETING

1. Schedule your training meeting, and send e-mail, voice mail, or memo to all of your team, informing them of date/time. Also, remind them to complete the week's listening assignment.

Date of training meeting: _____

Time of training meeting: _____

I have invited my team.

2. Listen to this week's audio lesson.

I have listened to "Planning and Scheduling: What's the Difference?"

Notes:

3. Key points from this week's audio:

- A plan tells you what to do. A schedule merely tells you when to implement the plan.
- The concept of inter-locking objectives:
 - What must happen?
 - How long will it take for each of these things to happen?
 - How do I prioritize these activities?
 - How do I allocate the time for these activities to occur?
- Three tips to improve scheduling:
 - 1) When traveling to a particular spot, say to yourself "What time do I have to leave to get there?" And add twenty percent (20%).
 - 2) Schedule activities on the quarter of the hour.
 - 3) If you think something is going to take a certain amount of time, add twenty or forty percent.
- The single biggest key to time-management is SELF-DISCIPLINE.

4. Get ready for your training meeting the day before it's going to be held:

- Make sure the meeting room seating is arranged for group discussion.
- Be sure to have at least one large whiteboard and/or flip chart with markers.
- Send an e-mail, voice mail, or memo reminder to your team.

Topics for Discussion/Action at Your Training Meeting on “Planning and Scheduling: What’s the Difference?”

- What do you think planning and scheduling have to do with Pre-Call Planning?
- Describe a time that you managed your time improperly and it caused you a problem. How did you (or can you) avoid making the same mistake again?
- Describe a time that you could have prioritized your tasks better. Do you think the system described in this audio makes sense?
- Quickly make a list of up to ten things you have on your to-do list right now:
 - Prioritize your list as A, B, or C items
 - Then look at all of the ones you called A’s, and prioritize them as AAA, AA, or A
 - The AAA’s then become your first priority items

Note to Leader: Be sure to allow participants enough time to work through this activity during the meeting.

- Did you develop a plan for one of your leads or applicants? What is your objective for this person?
- How do you think planning specifically for each of your target segments would help you gain more accessions?

SALES SUCCESS WORKSHEET

PLANNING AND SCHEDULING: WHAT'S THE DIFFERENCE?

I listened to *“Planning & Scheduling: What’s the Difference?”*

- What does this audio have to do with pre-call planning?

- What problems do you have with planning and scheduling? (Time allocation? Organization?)

- Choose one lead or applicant:

Name:

- Develop a plan for this person.

What is your objective?

By when?

What do you need to make your plan work?

What is your SCHEDULE for engaging this person?

- Bring this worksheet to the next training meeting and be prepared to discuss your answers.