**Note Taking Packet**

**for**

**Own Your Job: *Five Tools for Self-Management and***

***Accountability in the Workplace***

**Introduction Comments by Michael**

This packet can be used for notetaking as you read and work through the exercises in *Own Your Job: Five Tools for Self-Management in the Workplace*. This will be of particular value for people who have the digital copy of the book, but it will also be helpful to people who have the paperback version. This packet includes exercises within the chapter and the end-of-chapter action plans. There are also a number of forms, assessments and templates that you can obtain from my website [www.michaelcolburnphd.com](http://www.michaelcolburnphd.com) that are also in the book. Just click on Resources when you go to the website. These handouts are listed by chapter for easy access. Print out as many copies as you need. They are in Word format.

**Introduction: *Living a Proactive Lifestyle***

**Time Use Assessment**

|  |  |  |
| --- | --- | --- |
| **Significant Few** | **Maintenance** | **Trivial Many** |
| Professional:% of time \_\_\_\_\_\_\_ | Professional:% of time \_\_\_\_\_\_\_ | Professional:% of time \_\_\_\_\_\_\_ |
| Personal:% of time \_\_\_\_\_\_\_ | Personal:% of time \_\_\_\_\_\_\_ | Personal:% of time \_\_\_\_\_\_\_ |

|  |
| --- |
| To improve my time use I will ….. |

|  |
| --- |
| In reading this chapter, I made the following discoveries: |
| After reviewing these discoveries, I now Intend to: |
| Some immediate actions I will take to make progress on this intention are: |

**Additional Notes**

**Chapter One: *Discovering Your Talents, Strengths and Passions***

Handouts on the website include:

* Success Stories
* Annual Evaluation Questions
* Personal Self-Assessment
* Professional Self-Assessment

**So, What Have You Learned?**

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| What are some talents you have discovered?How have these talents helped you in your current position?Which of these talents have you not had -- or not taken- the opportunity to use in yur current position?In the space below, describe your ideal professional position, one that leverages your talents to create a meaningful career. |

**Additional Notes**

**Chapter Two: *Determining the Needs and Expectations of your key Relationships***

Handouts on the website include:

* Key Relationship Interview Form
* Key Relationship Interview Summary

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| ***My key relationships are:*** |

**Themes from Key Relationship Interviews**

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| The themes I identified from question 1, “What’s working?” are: |
| The themes I identified from question 2, “What are your needs and expectations for me?” are:  |
| The themes I identified from question3, “What are the indicators for success for these needs and expectations?” are: |
| The themes I identified from question 4, “What can I do to improve?” are” |

**Key Relationship Interview Plan**

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| --- | --- | --- | --- |
| **Key Relationship Name** | **Appt Date** | **Interview Complete** | **Entered on Summary Form** |
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| --- | --- |
| **Action Items** | **Completed** |
| Identify my key relationships |  |
| Conduct my key relationship interviews |  |
| Analyze the key relationship interview information |  |

**Additional Notes**

**Chapter Three: *The Principles and Tools of Self-Management and Accountability***

Handouts on the website include:

* Core Principles of Self-Management and Accountability Assessment
* Self-Management Practices Questionnaire

|  |
| --- |
| ***In reviewing my responses to the five Self-Management Principles, I discovered that I …*** |
| ***The one principle that I find most challenging is …*** |

|  |
| --- |
| ***In reviewing my responses to the five Self-Management Practices questionnaire, I discovered that I …*** |
| ***Based on these discoveries, I now plan to …*** |

|  |  |
| --- | --- |
| **Commitments** | **I will complete by** |
|  |  |

**Additional Notes**

**Chapter Four: *Tool # 1: The Performance Agreement***

Handouts on the website include:

* Performance Agreement template

|  |
| --- |
| ***My talents include:*** |
| ***I can use my talents to:*** |
| ***Limitations I need to manage are:*** |

**What are your Key Relationships’ Needs?**

|  |
| --- |
| ***What are the key products/services to provide for your key relationships?******How do these products/services create value for them?******Why are these important? What benefits do they create?*** |

**Identifying Your Guiding Principles**

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| ***What are the qualities of character that you admire in others?******What are the behaviors in others that may cause you to end a relationship?******What are the behaviors that you embrace to live a life of integrity?******My guiding principles are:*** |

Before moving on to steps 5 through 8, complete the following items.

|  |  |
| --- | --- |
| **Action Items** | **Completed** |
| Create my job mission statement |  |
| Determine my guiding principles |  |
| Identify my limitations |  |
| Fill out page one of my performance agreement |  |
| Schedule a meeting with my direct manager to review page one of my performance agreement |  |

|  |
| --- |
| ***The key result areas of my job are:*** |

**Key Result Areas – Commitment Statements**

|  |
| --- |
| KRA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***I will:*** |
| KRA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***I will:*** |
| KRA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***I will:*** |
| KRA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***I will:*** |
| KRA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***I will:*** |
| KRA \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***I will:*** |

**Choosing Your Best Performance Measures and Goals**

|  |  |  |
| --- | --- | --- |
| **Key Result Area** | **Performance Measure(s)** | **Goal(s)** |
|  |  |  |

|  |  |
| --- | --- |
| **Action Items** | **Completed** |
| Determine the key result areas for my job |  |
| Write a commitment statement for each KRA |  |
| Select performance measure(s) for each commitment statement |  |
| Establish goal(s) for one or more KRA area |  |
| Transfer the above items to the performance agreement template |  |
| Schedule a meeting with my direct manager to review the progress on my performance agreement, |  |

**Additional Notes**

**Chapter Five: *Tool # 2: The Goal Achievement Method***

Handouts on the website include:

* Goal Achievement form

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| ***My personal goal is to:*** |

|  |
| --- |
| ***My work-related goal is to:*** |

|  |  |
| --- | --- |
| **Action Items** | **Completed** |
| Develop a goal achievement plan for a personal goal |  |
| Develop a goal achievement plan for a work-related goal |  |
| Complete my performance agreement (performance measures and goals for all key result areas, with established tracking system) |  |

**Additional Notes**

**Chapter Six: *Tool # 3: The Priority Feedback System***

Handouts on the website include:

* Priority Feedback Meeting form

|  |  |
| --- | --- |
| **Action Items** | **Completed** |
| Schedule and conduct a priority feedback meeting with my direct manager |  |
| Review my progress on my performance agreement |  |
| Agree on the overall agenda and format for future meetings |  |
| Agree on the frequency of meetings |  |
| Establish priorities for the next period of time |  |

**Additional Notes**

**Chapter Seven: *Tool # 4: The Individual Learning Plan***

Handouts on the website include:

* Individual Learning Plan form

|  |
| --- |
| ***Some of my learning needs and interests are:*** |

|  |  |
| --- | --- |
| **Learning Need/Interest** | **Learning Goal** |
|  |  |
|  |  |
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| --- | --- | --- |
| **Learning Goal** | **Value** | **Investment** |
|  |  |  |
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| --- | --- |
| **Action Items** | **Completed** |
| Assess my learning needs and interests |  |
| Identify one high-value learning goal |  |
| Develop a learning plan |  |
| Ask one person to be a learning coach or fellow learner |  |

**Additional Notes**

**Chapter Eight: *Tool # 5: The Performance Portfolio***

Handouts on the website include:

* No handouts on website

|  |  |
| --- | --- |
| **Action Items** | **Completed** |
| Set up my performance portfolio |  |
| Transfer all of the information I have to the performance porfolio |  |
| Add the review of my performance portfolio to the agenda fir my next priority feedback meeting |  |

**Additional Notes**

**Chapter Nine: *Your Continued Growth and Development***

Handouts on the website include:

* No handouts on website

**Celebrate Your Progress**

|  |
| --- |
| ***Some things I have accomplished are:*** |
| ***Describe the impact of these accomplishments:*** |
| ***Gifts I have discovered within myself:*** |
| ***Gifts I have received from others:*** |
| ***I have told the following people the gift I received from them:*** |
| ***The crossroads where I find myself at this stage of my life or work is:*** |

**Plan for Continued Growth**

|  |  |
| --- | --- |
| **Action Items (*I will …)*** | **Time Frame** |
|  |  |

**Additional Notes**

**Chapter Ten: *Promoting Team Accountability***

Handouts on the website include:

* Assessing Your Team Meetings assessment
* Team Charter
* Action Minutes form

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| --- | --- |
| **Productive Meetings** | **Waste of Time Meetings** |
|  |  |

|  |
| --- |
| ***In reading this chapter, I made the following discoveries:*** |
| ***After reviewing these discoveries, I now intend to:*** |

**Additional Notes**

**Chapter Eleven: *The Self-Managed and Accountable Organization***

Handouts on the website include:

* No handouts on website

**The Core Principles of Self-Management**

|  |
| --- |
| ***In reviewing these principles, I discovered that I:*** |
| ***I was pleased to learn that:*** |
| ***I was disappointed to learn that:*** |

|  |
| --- |
| ***Servant leadership observations I have made:*** |

**Aligning Your Organization’s Policies to Support Self-Management**

|  |  |
| --- | --- |
| **Desired State** | **Current State** |
|  |  |
| **Driving Forces** | **Impeding Forces** |
|  |  |

**Actions to take to:**

|  |  |
| --- | --- |
| **Leverage the Driving Forces** | **Weaken the Impeding Forces** |
|  |  |

|  |
| --- |
| ***In reading this chapter, I made the following discoveries:*** |
| ***After reviewing these discoveries, I now Intend to:*** |

**Additional Notes**