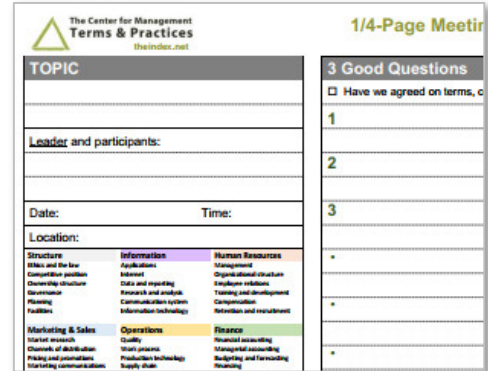


## 1/4-PAGE MEETING PLANNER

*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, CMTP*

### 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.



### Benefits: Focus everyone’s time

The Center’s tools are used with The GMs 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

<b>Difficulty</b>	Easy
<b>Estimated time required</b>	15 minutes, tops
<b>Special skills</b>	None

### Instructions: It’s all about the questions

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

1. Scan *The GM’s Index* at [www.theindex.net](http://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 Topic (i.e., the purpose of the meeting) 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!

Members can of course contact the Center for assistance: [info@theindex.net](mailto: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.



## 1/4-Page Meeting Planner

### TOPIC

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-----

### 3 Good Questions

Have **The GMs Index** open: [www.theindex.net](http://www.theindex.net)

Term:

1

Term:

2

Term:

3

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### Discussion Notes

☐ Did we agree on the terms in **The GMs Index**?

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☐ Continued on back

The top three ★

### Decisions and Tasks

1

2

3

4

5

6

- ☐ Did this meeting meet its goal?
- ☐ Did we distribute and file the notes?