

TEAM Report Card

Use this form to prepare for weekly team meeting check in section.

TEAM MEMBER: Cooper Shubert

3-MIN UPDATE

List your top 3 priorities right now. Be prepared with a 3-minute update on the status of each priority.

1. Group 1 surge scheduling
2. CRM task, workflow and data clean up
3. Meeting prep work

CHECK IN

Take a minute to check in on and share how your week went.

I feel great about:	I could use help with:
1. Recent custodian transition being almost complete 2. Review surge period starting 3. Timeline/deadline communication	1. Prioritization of projects for next 14 days 2. Completing April '21 newsletter 3. Do/drop/delegate

ROADBLOCKS REVIEW

Feedback is our friend. Identify issues, concerns, or breakdowns that represent roadblocks for you or the team.

- Issue 1, give context, discuss and define the issue/ask/problem to solve
- Prioritization – lots of to do, no order & priority – walkthrough projects & set timeline, expectations.
- Time for surges – transition pushed schedule back for spring reviews, need to review timeline and extension

PRODUCTIVITY SCORE

Give this week's meeting a productivity rating.

1 = Time Waster (Put a Pencil in My Eye)7.5.....10 = Clear & Focused (Productive Progress)

NOTES & NEXT STEPS

Capture important notes and all your next steps from today's meeting and task/schedule by end of day.

- __Completed drop/do/delegate for outstanding projects_____
- __Prioritized meeting scheduling for T1-3 clients_____
- __Pended workflows for offer only clients to last few weeks of surge period
- __Set deadline of 3/29 for April newsletter completion_____
- _____