**08 - Personal Action Meeting Format**

This document is used by each team member for their weekly action meeting. It is useful if each member uses generally the same format, although members may choose, at the discretion of their action meeting triad, to alter the format as needed. The objective of all action meetings is to produce a short, targeted list of focused actions to advance the actionee’s earning recovery. The action meeting is 1 hour in length.

Dial in phone number is ###-###-####

Access code is #######.

**Ground Rules**

The following are ground rules for how action meetings are to be conducted while on the team. It may be helpful to read Ground Rules at the beginning of EACH action meeting!

**Examples**

* The team’s success depends on each of us succeeding as individuals. When you succeed, I succeed. When you succeed, we succeed.
* Action meetings are a privilege.
* We agree to come to action meetings with a positive attitude, and an intention to create value for ourselves and others on the team, and a commitment to producing results. A professional atmosphere is to be maintained in all TEAM action meetings.
* Members perform the meeting in a timed round robin environment ensuring that everyone’s voice is heard equally.
* Assignments are to be completed to the best of the actionee’s ability.
* If an actionee is struggling with an assignment, action team members work together to define the next, right, smallest action that the actionee can work on. As a last resort, action meeting time can be used to perform that action.
* If an actionee continues to experience problems with implementing a particular course of action, week after week, it is an indication that the actionee is need of greater support. The **08 - Personal Action Meeting Format** then puts focus on helping that actionee get the support needed; e.g.:

Book-ending

Action partner

Time log, etc.

* Producing results and moving forward in our lives is the purpose of action meetings. Go Team Go!!!

**Action Meeting Agenda:**

**Serenity Prayer**

**1 - Statement of monthly financial target**

My intention is to generate **$##,###** income per month.

**2-Acknowledgements and celebrations for the past week (5 minutes).**

What do you want to celebrate? What have you accomplished? Successes?
Examples:

* Pressure washed house; windows cleaned
* schedule appraisal
* paid off xxx debt
* enjoying price increase

**3- What is your definition of underearning recovery? Have you been adhering to it? (3 minutes)**

Examples

* Having solvent and positive cash flow earning assets; making my monthly minimum earning needs.
* With God’s help, I manage my resources—time, money, talents, relationships, health— that allows for a solvent, dignified, prosperous & joyous life. I agree to speak to at least 8 prospects per week.

**4-What challenges are you having achieving/maintaining recovery from underearning?
(10 minutes)**

Answer the following questions, as relevant:

* Where am I procrastinating? Where are there unmade decisions?
* Where am I acting like a victim? Where am I acting like a hero?
* What have I regretted? Do I have any regrets this week?
* Have I done something that I am afraid to do?
* Have I been conscious with regards to my intimate relationships?
* Status of specific properties? Rent collected? Houses Sold?

(Important for new action teams:)

* What are your major sources of income?
* What percentage of your income comes from those places?
* Give a brief overview of the status on each source of income and the short and long term goals for each.

**5-Current Status (5 minutes)**

* How much have I earned since my last action meeting? Make sure your score on the scorecard (**13 - Team Scorecard and Instructions)** is up-to-date. (Option: hyperlink to Team Score Card AND Life Indicator Record (**10 - Life Indicators for Personal Action Meetings**)
* What do your pipeline / prospects / job leads look like and are you on track to make your monthly target (this month and next)?
* What has happened since your last action meeting? What are the major events that you need to update your action team on?

(Optional tools: the following 3 tables are examples of ways to track prospects and income. These tables are specific to one kind of business activity [sales]. The tables can be used to reflect ANY kind of work activity, and can be renamed accordingly - e.g., for tasks related to a work project.)

|  |
| --- |
| Steps in Sales Cycle |
| 1 - not yet qualified | 5 -- proposal delivered |
| 2 - qualified prospect, seeking 1st appt. | 6 -- objection handling |
| 3 - 1st appt. set | 7 -- verbal agreement |
| 4a - 1st appt. complete, working on proposal | 8 -- signed contract |
| 4b-1st appt. complete need additional information | 9 -- service and source for referrals |

**Current Potential Projects (As of MM/DD/YYYY)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Project | Balance for Project | Gross Profit remaining | Date billed | Estimated Delivery |
| Sam’s Lighting | Website | $4000 | 3000 | 2/3/14-$4083 | August |
| Johnson’s | Brochure | $1950 | $1500 |  | July |
| Amalgam industries | Video Series | $4500 | $2500 |  | August |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**New Sales Projects (As of MM/DD/YYYY)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Stage in Pipeline | Value | Gross Profit Est | % Close | Date entered into pipeline |
| Sam’s Lighting | 2 | $5000 | $3000 | 80% | July 3 |
| Johnson’s | 5 | $3900 | $1400 | 90% | 10/15/13 |
| Amalgam industries | 4a | $7500 | $4000 | 70% | 3/1/14 |
|  |  |  |  |  |  |

**6-Spiritual Condition (5 minutes)**

Underearning is the result of a spiritual malady- use this time to discuss your spiritual condition.

**7-Urgent Matters**

Are there any urgent matters that you want to bring to your action team’s attention? What’s the most pressing issue in your underearning right now? Refer to the Action Items list, below.

**8- Action Items List & Assignments**

What are your assignments from your last action meeting? Did you do them? What was the outcome? What actions do you need to take in the next week to advance your initiatives and support your effort to meet your financial target? Identify the highest priority items with an asterisk (\*).

No more than 3 actions should be starred so that the Actionee does not feel overwhelmed.

|  |  |  |  |
| --- | --- | --- | --- |
| **ID** | **Action Items**  | **Date Assigned** | **Status** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**9 - What is my progress on my goals?**

(Option: hyperlink to the **11 - Individual Member’s Goals** -to be reviewed at the first week of each month)

**Serenity Prayer**