

Name \_\_\_\_\_ Date \_\_\_\_\_

Intention for the Course:

davidford-cartoons.com



DAVID FORD

Name \_\_\_\_\_ Date \_\_\_\_\_

Important Insights/Learning Today:

Next Actions to Take:

By When:

Request(s) I Will Make to Support Next Actions:

Of Whom:

By When:

---

## Cleaning Out Debrief Handout

Areas Cleaned Out:

---

---

Smithsonian and/or Ripley's Found:

---

---

Lessons Learned:

---

---

Results Produced (for you, your staff, your students):

---

---

Challenges With Cleaning Out:

---

---

Next To Clean Out & By When:

---

---

### **PART I**

How many times a week do you meet?

At what time(s) of the day do you meet?

Where do you meet?

How much time do you spend meeting?

What have you told others about this meeting so that they don't interrupt it?

### **PART II**

- What does the executive bring to this meeting?
- What does the secretary bring to this meeting?
- What do you cover in this meeting?
- What don't you cover in this meeting?
- How do you deal with items not covered in this meeting?

### **PART III**

- How does your day generally go when you meet?
- How does your day go when you don't meet?

### **CONSIDER**

- What requests do you now have about your daily meeting and of whom?

**REQUEST** – the act of asking someone for something, either to fulfill certain conditions, or to produce a specific result; 4 parts to a request (1) Who, (2) What,(3) By When, (4) Satisfaction Requirements.

### 3 Possible Responses to a REQUEST

- **ACCEPT** – I agree to do what you are asking of me and I make an agreement to fulfill
  - **AGREEMENT** – a pledge to do something in the future
- **DECLINE** – I do not agree to do what you are asking of me and I make no agreement to fulfill **4**
- **COUNTEROFFER** – I do not agree to do what you are asking of me exactly the way you are asking, “but what about...”; willingness to make a different agreement

*You already do this, directly or indirectly, every day.*

Effective action depends on your skill at making clear requests and eliciting agreements from others. We call these verbal exchanges **Conversations for Action**. Effective **Conversations for Action** translate intentions into measureable results.

**When you're a committed partner you**

- Accept
- Decline
- Counteroffer Requests

**When you're NOT a committed partner you IGNORE Requests**

**When you're a committed partner you**

- Keep your agreements
- Revoke your agreements
- Agree to Agree

**When you're NOT a committed partner you BREAK Agreements**

---

## The Process of Making & Managing Requests

1. Make Clear Requests
2. Put your requests in writing
3. Track the requests you make
4. Check in regularly: “How’s it going?”
5. Hold others accountable

---

## How to Transition Email Management (Intentionally and Responsibly)

### Two Pre-Conditions Before Transitioning Email

- A. Scty must be fully in-the-know about the Exec's work.
  - Daily Meeting, 5 days a week, minimum 3 months
- B. Exec must get fewer emails □Retraining Conversations
  - 'Please stop sending me emails that should to go to (NAME). I don't have my hands in that. (NAME) keeps me informed.'
  - "My priorities are X, Y and Z. I spend limited time on email; I talk to people in-person or via phone."
  - "The best way to reach me is to contact my secretary."
  - "Let's talk when I'm out on Coaching Days."
  - "Please edit our website to reflect...'

### Inbox Zero - Process

- Step 1. **Alphabetize** emails by sender
- Step 2. Junk ... **Delete**
- Step 3. For reference later... **File**
- Step 4. For someone else...**Forward**
- Step 5. Email requiring action or response; takes <1 min to handle
  - **Handle** then delete or file, OR
  - **Print** for in-person discussion on next Coaching Day
- Step 6. Email requiring action or response; takes >1 min to handle
  - **Forward to Secretary** □**schedule work time**

### Transition Learning Plan

1. "3 for 5" for two weeks – Unsubscribe from JUNK
2. "10 for 10" for two and a half months – Train & Develop in Daily Meeting
3. Secretary notices communication patterns; reports data
4. Executive coaches, trains, develops

---

## Executive Sets-Up Coaching & Office Days with Staff

“I want to hear about the things that drive you crazy around here. I need to know about the systems that don’t support you. I need to know because it’s my job to support you in doing your job, and your job is the most important thing that’s happening in this place. If it’s not happening in your classrooms, it’s not happening.

“So for two full days each week I am going to be out and about in the building. I call these two days my Coaching Days. I want you to lay it all on me on my Coaching Days when I am out and completely available to you. Either pull me aside in the hallway, catch me at the door of your classroom, or pass me a note when you see me walk by. We can even talk directly at the end of my Coaching Day when I am back in my office. I simply want to gather information from you over the next \_\_\_\_ weeks.

“When you need to speak privately with me, I want you to have that time as well. Some of you and I haven’t had a 15 minute conversation together since I’ve been here. And there are times when I want to listen and focus on you as an individual. I want to be able to meet with you on-time, uninterrupted, and without rushing, because I value your time – you don’t have much time.

“So if you need me one-on-one, please see \_\_\_\_ and make an appointment with me on one of the three days a week that I will be in my office. Talk with \_\_\_\_ first. She will find out from you when you’re available and schedule a face-to-face for us. You will only need to ask once - she will take care of the rest. And I will be there for you on-time, present and available.”

## Secretary Language for Protecting Coaching & Office Days from Staff

“Wow! Sounds like something you should really talk to him/her about. Sounds like you should talk to him in the next \_\_\_\_ hours. When is your prep period on \_\_\_\_? How about \_\_\_\_ o’clock on \_\_\_\_ or \_\_\_\_ o’clock on \_\_\_\_\_. Is there anything I can share with him in our next meeting to better prep him for his conversation with you? Thanks for dealing with me on this. I’ll see to it.”



---

## Executive Sets-Up Coaching & Office Days with District Office Staff

“Given my commitment to being in classrooms two full days every week, you may find it more difficult to reach me spur of the moment. I wouldn’t want to be you trying to reach me last minute, and you’re not able to because I’m in a classroom where I can’t receive emails, calls or texts.

“So I am going to make your job much easier. We’re going to become your favorite site. When you call because you need to meet or speak with me, or you need something from my office, ask for \_\_\_\_\_ first. Talk with \_\_\_\_\_ first. She will come up with a mutually agreeable time for us to connect and get it on my calendar.

“And then I will be there on the day and time she schedules for us to get you what you need. You will only have to call my office once - my team and I will do the rest. Please tell \_\_\_\_\_ what you need. She will get the ball rolling and prep me appropriately for our conversation.

“If an emergency arises, again, please call \_\_\_\_\_ first. Tell her what’s going on. Chances are she will be able to assist you, but on the rare occasion when you actually do need me, she will get me.

“Please work with \_\_\_\_\_ so that we may enable you to do your job well. I appreciate your support of my being out in classrooms, doing the work that truly makes a difference.”

## Secretary Language for Protecting Coaching & Office Days from District Office Staff

“Thank you for letting me know what you need. I know it’s important to you. I will be meeting with \_\_\_\_\_ at \_\_\_\_\_. I will email/call you with the answer at the conclusion of the meeting. Is there anything else that you need? Thanks for dealing with me on this. It will be taken care of by \_\_\_\_\_.”

“Thank you for letting me know what you need. I know it’s important to you. There’s a copy of \_\_\_\_\_ at \_\_\_\_\_. Do you need it too? Is there anything else that you need? Thanks for dealing with me on this.”

“Thank you for letting me know what you need. I know it’s important to you. When you drop by, see me and you and I will take care of this. Is there anything else that you need? Thanks for dealing with me on this. It will be taken care of by \_\_\_\_\_.”

---

## Executive Sets-Up Coaching & Office Days with Parents

“I have the privilege of being your child’s principal and I take that responsibility very seriously. Our goals this year are \_\_\_\_\_ and \_\_\_\_\_. My job is to ensure your child reaches and exceeds these goals.

“In order to attain this for your child and all of our students, I will be in classrooms two, full, uninterrupted days each week focused solely on improving teaching and learning. I call these days my Coaching Days. On my Coaching Days I am in classrooms for 6-8 hours at a time, out where the work is happening and where I can make the greatest difference for your child. Coaching Days are dedicated to observing, listening to, and supporting all our students, and I look forward to watching your child grow academically and socially.

“Now I know there may be occasions when you want to reach me with a question or a concern about your child, or you have an idea you’d like to share. Please know I appreciate your input and I do want to hear from you.

“In order to generously service your needs, while insuring the highest quality learning opportunities for your child, I ask for your partnership with the following:

“When you wish to speak with me directly, please call my secretary, \_\_\_\_\_ at \_\_\_\_\_. Tell \_\_\_\_\_ you’d like to connect with by me phone or face-to-face. \_\_\_\_\_ will offer you 3 possible meeting times with me on days when I am scheduled to be in my office. Choose the day and time that works best for you and \_\_\_\_\_ will get our meeting on my calendar. Then at the appointed time, I will call you or meet with you in my office and we will have uninterrupted quality time to talk.

“If you need an answer to a quick question, you may access help by x, y or z, or... or by calling my secretary, \_\_\_\_\_. Most likely, \_\_\_\_\_ knows the answer and she can direct and guide you. Thank you for your ongoing support and partnership.”

## Secretary Language for Protecting Coaching & Office Days from Parents

“Thank you for letting me know what you need. I know it’s important to you. Here’s what I am going to do to address your concern and get you what you need: (speak promises). I will make sure he/she gets the message/acknowledgement by (when). Is there anything else that you need? I am so glad I could help you.”