

BUSINESS BASICS WORKSHEET

WEST BUSINESS DEVELOPMENT CENTER

SELF-MANAGEMENT CHECK LIST | PAGE 1

SELF-MANAGEMENT CHECK LIST

Let's identify where you are with self-management. This will allow you to prioritize what efforts and actions should be taken to improve you as a leader. Circle TRUE (T) or FALSE (F).

- T F 1. I schedule on my calendar more than 50% of what I do each day.
- T F 2. I often make appointments with myself in my calendar.
- T F 3. I have no problem spending 1-2 hours each business day working on my business and/or life from a high-level place, without interruption or distraction.
- T F 4. I calendar with key people (including family) via white board, online calendars etc. so we don't waste time setting appointments and can coordinate with each other easily.
- T F 5. I use my calendar to hold long-term commitments and project steps, so I don't have to keep them in my head.
- T F 6. 6. I often scan days or weeks ahead in my calendar to see what is coming.
- T F 7. 7. I use my calendar to remind myself to follow up with people and hold them accountable so, I do not have to remember.
- T F 8. I have a complete Project List that I work from and review it at least once a week.
- T F 9. I extensively use my someday/maybe list.
- T F 10. I check my 43 folders/ tickler file on a daily basis.
- T F 11. I use agenda lists to batch items for meetings with key people.
- T F 12. I regularly get done more than 80% of my to-do list each day.
- T F 13. My to-do lists and calendar drive most of what I do each day and keep me focused.
- T F 14. My workspace is almost never cluttered. The only items visible are those that I'm currently working on or that require action from me.
- T F 15. My filing cabinet is fun to use, alphabetized, not more than 3/4 full and there is only one manila folder in each hanging file.
- T F 16. 16. I can create a new, typed physical file folder in under a minute.
- T F 17. 17. I can find any physical file in under a minute. All my file folders are type-labeled.
- T F 18. 18. I can find anything in my office or any other workspace in under a minute.
- T F 19. My computer desktop is clean and free of icons I am not currently using.

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SELF-MANAGEMENT CHECK LIST | PAGE 2

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- T F **20.** All data I access is organized by folders that are easy to navigate such that someone else could easily find something.
- T F **21.** All our company's data is backed up on a daily basis via Internet off-site.
- T F **22.** I have a physical inbox and empty it completely most days.
- T F **23.** I empty my email inbox most days.
- T F **24.** I always return messages within 24 business hours.
- T F **25.** I do what I say I am going to do more than 90% of the time.
- T F **26.** I keep with me some kind of capture tool (paper pad, voice recorder, etc.) wherever I go.
- T F **27.** I am rarely overwhelmed, and if so, not for longer than a few hours.
- T F **28.** It's easy for me to only be focused on whatever I'm doing in the moment because I'm organized and my head is clear.
- T F **29.** I have a meeting with myself each day to plan my day and focus on the day's priorities.
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Add up only the total **TRUE (T)** answers in this section and input the sum in the **TRUE (T)** column. Then divide the number of **TRUE (T)** answers by the total number of questions in the section and input the percentage below.

$$\underline{\hspace{2cm}} \div 29 \text{ questions} = \underline{\hspace{2cm}}$$

Total TRUE (T) answers Percentage of TRUE (T) answers
