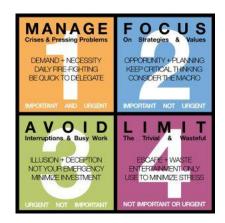# TEAM COMMUNICATION SYSTEMS AND EXPECTATIONS

GOALS: To operate at maximum efficiency, both collectively and individually. To Deliver Massive Value to clients, through an intentional, proactive system that allows us each to be well paid with flexible schedules and quality of life.

QUADRANT 1 IMPORTANT AND URGENT *(top of mind doesn't count)*

Examples: Urgent client request/issue requiring same day response; Critical system breakdown; Unexpected Team needs;

Systems: Ring Central texting; traditional texting; email; phone;

Important Questions: How do we still deliver massive value? Does this need additional support? How do we get back to Q2? What could have been done in Q2 to prevent this from landing in Q1?

QUADRANT 2 IMPORTANT NOT URGENT

Examples: Projects; Value Adds; Nearly all client requests, service items, memos and trading;

Systems: Salesforce for all client related items; Asana for all non-client items; Calendaring. No email on projects internally. ***Schedule time to discuss projects with team members vs 'quick questions'***

Important Questions: How do I best get the support I need from within Q2? How can I minimize distractions for others related to this project, while still getting the support I need? What tasks can I pull from Q1 & Q3?

QUADRANT 3 URGENT NOT IMPORTANT

Examples: Majority of alerts and notifications (email, phone, pop-ups) or anything that distracts/interrupts focus.

Systems: Voicemail. Turn off all non-Q1 alerts. Check email and voice mail only at scheduled times. Beware of the F.O.M.O. monster. Force venders to use Asana.

Important Questions: How did an unimportant task become urgent? Where did this system breakdown?

QUADRANT 4 NOT IMPORTANT, NOT URGENT

Examples: Emails not related to clients or projects and/or emails not required action; Solicitors; Every alert, 'ding', vibration, pop-up, pulls us out of Q2 and into Q4

Systems: Sanebox; Unsubscribe; Outlook rules; new email for NJ/MJ; Ignoring non-client calls/emails;

Important Questions: Does this really need my attention? What's the least amount of time I can dedicate to this task? In a perfect world, how would this be handled? How do I eliminate or at least reduce these items?

QUADRANT 5 WORRY/FEAR/ANXIETY

Example: "Did this get done?!?" Was the client called back? Is the project on status? Does (team member) understand? Is this getting screwed up?

Systems: See respective Quadrant instructions. Fear-set. Work with team to improve system. *"My apologies if this sounds silly as I know we are both committed to the team's success, but I'm nervous about…"*