



T Mobile | **L.E.A.D.**

PROCESS OBSERVATION GUIDE

PLAN, TEST, EXECUTE

LEADING BUSINESS SUPPORT

T Mobile | **L.E.A.D.**

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PROCESS OBSERVATION GUIDE

This Process Observation Guide...

...is designed to provide you with support, resources, suggestions, and direction for planning, testing, and *potentially* executing a process improvement project.

Use this guide for visibility to **Process Improvement** tools, to formulate and track your ideas, new contacts, resources, interviews, and operational observations, etc. You'll use this information to holistically view a process and then determine your recommendation(s) for what, why, and how to drive a potential performance/process improvement project. And *possibly*, when to leave a process alone.

We know you want to get going! Before you jump in, here are a few definitions and important things you'll need to keep in mind: Remember in school when you first learned about making a scientific hypothesis? Do you remember the definition?

hy·poth·e·sis *noun*

- 1) a supposition or proposed explanation made on the basis of limited evidence as *a starting point for further investigation*.
- 2) hypothesis an educated guess about a possible solution to a mystery; a *prediction or statement that can be tested*; A reasonable or educated guess; what a scientist thinks will happen in an experiment.

Your role in the Process Observation activities during L.E.A.D. Performance and then flowing into your Change of Scenery Stretch Assignment, is to be an independent, unbiased 'scientist/witness' or 'consultant/observer'. One of your main responsibilities is to try to disregard your first instinct, to be your typical, awesome DM persona who jumps into action and knows when and which levers to pull.

Instead, your job is to learn how to stand back a bit, take a beat and a breath, observe the bigger picture, and **not** react, coach, or fix what you see immediately. You will be assuming positive intent and that people are doing the best they can. You can ask lots of powerful questions (Influence through Listening) and you can watch all you want. However, YOU ARE NOT IN CHARGE right now*.

This will be a challenge and may be harder for some people, especially when you've been very successful at 'fixing' things. This opportunity and these activities are designed to stretch and shift your mind set and your role from problem solver/fixer to systems/process researcher and systems thinker. This will also give you new ways to approach improvement opportunities so you can influence and shape our business in broader, more holistic, and potentially more significant ways. **How cool would that be?!**



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**If there is ever an action being taken by a T-Mobile employee or customer that contradicts T-Mobile legal, ethical, or safety standards or if there is a potential of a safety issue for customers or employees, definitely jump in to help and lead.*

Your focus is to objectively observe a process within a larger system and/or broader business environment. Then, to make recommendations about whether to make changes or not and if so, where to invest focus, time, and, if necessary, human, or financial resources.

Or after doing your due diligence and research, collecting information and data, you may also decide that the process is working 'ok' for now. You may recommend that there are other areas that need to work better first. Sometimes, not doing anything is as useful and beneficial (or more so!) to the overall system than taking immediate action.

From your skills, knowledge, and experience, you may come to the project with a high-level idea, or 'hypotheses' about what is happening, what needs attention, and what you can do to make something work better.

However, this is an improvement *intervention*. Your hypothesis may be correct, but you must challenge yourself and your colleagues to delay hypothesizing and landing on decisions and actions until you've collected enough information and data necessary, interviewed a wide enough section of resources, participants, and/or customers to get a systemic view of the broader environment you're observing.

- What do you see as the 'bigger' picture or story here?
- What are the impacts to/from the larger, interconnected system?
- What barriers are in place and are they in place for an important reason?
- Who will need to be influenced? Who knows the most about this and who should you interview? Who will make decisions about this?
- What will make the biggest impact? Short-term? Long-term?
- How does that impact the whole system?

As you navigate through different activities in this guide, in the workshop, and in your stretch assignment, challenge yourself to think about the interconnections of People, methods, machines/tools, materials/resources, and the environment. How does everything fit together, connect to other systems, and effect outcomes beyond what you immediately see?

Again, this assignment and this project will challenge your 'action' muscles to take a backseat. This is an important skill to learn as not everything requires or deserves your attention and action.

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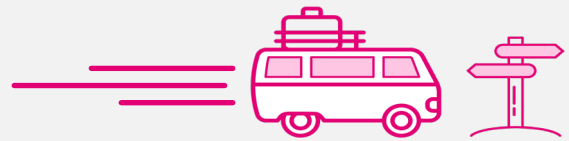
Reach out to your Cohort peers to help each other as well as Stretch Leaders, Sr. Leadership Trainers, Mentors, and Process Improvement SME along the way with questions or when you need support or to brainstorm about your work related to your ideas and focus on Stretch Assignment.

NOTES: Planning Meeting with your Mentor and/or Sr. Leadership Development Trainer

Task: Once you've selected your opportunity, schedule an initial meeting with your Mentor or Sr. Trainer to talk through your plans and thoughts on observation activities. You should plan to meet with them as often as necessary to support your work over the next (approx..) 90 days. Suggest meeting at least once a week to begin with and maybe more frequently as you get closer to building your Executive Summary and Capstone Presentation.

Use this space and others like it, to make notes about the meeting(s). Capture information and ideas you may want to try out during your stretch assignment. This includes contacts and HQ teams that you may want to work with. Ask for help when and where you need it!

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PROCESS OBSERVATION GUIDE

Using ‘beginner’s mind’:

MARKET OBSERVATION: Your Favorite businesses

Task: Observing **Non-T-Mobile** businesses.

Focus: Using ‘beginner’s mind’ defined as:

“...dropping our expectations and preconceived ideas about something, and seeing things with an open mind, fresh eyes, just like a beginner. If you’ve ever learned something new, you can remember what that’s like: you’re probably confused, because you don’t know how to do whatever you’re learning, but you’re also looking at everything as if it’s brand new, perhaps with curiosity and wonder. **That’s beginner’s mind.**”

Plan to spend at least ½ hour observing each of several of your favorite businesses in action: A café, a local bookstore, candy/gift shop, hotel lobby, brick and mortar/single location retailer, shoe department at Nordstrom, favorite pub, etc. NOT another wireless company. Try to look for places that are outside of the normal retail-centric focus. What about a brewery? Or a local manufacturer or printing company. Looking for similarities like Inventory and vendor relationships.

Pay attention to the feeling(s) you have, when you enter, while you are there, when you leave. What do you notice? Where do your eyes go? What do you hear? Talk to someone that works there. Do they like their job? Why or why not. Try to determine what their brand is and who is their ideal demographic and customer? What does the service look, feel, and sound like? What is the flow? Rushed, relaxed, comfortable, stressful, clean, cluttered? Do you feel welcome? Why or why not? What can you learn from these businesses? What would you do differently if you were them?

This can be an activity you repeat several times to gain creative insight. The activity is designed to help you shake your successful, driven, DM action/fixer/responder persona and practice your observation, listening, and observation skills. This will be more important in the next activity. Be sure to capture notes below and bring them with you to your workshop.



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Using 'beginner's mind':

RESEARCH and MARKET OBSERVATION of T-Mobile (outside of your district and/or area)

Task: Visit a minimum of 3 different T-Mobile stores OUTSIDE of your realm of control. If possible, outside of your district or area would be ideal. This should be a mix of store types and channels. Think about our dealers too! This could include interacting with the Virtual Retail experience. There are many opportunities to better understand the broader business. You are going to objectively observe, reflect, ask questions, interview employees in various roles. If possible, interview a couple of customers.

Challenge yourself to look through 'beginners mind'. Use your previous non-T-Mobile observations as your model. You didn't know what to expect and you had no choice but to be objective and open to what was happening. You were able to watch, listen and learn!

So, with that same openness and objectivity, look at the store(s) you are in. What do you see, hear, feel in the space? How do customers flow into and out of the store? What is the environment like? How does the environment -physical, psychological, and behavioral- impact what's happening? What does the merchandising do for the people in the store? Take notes and if necessary, ask permission to take photos if that will help you remember things and tell your story later for your capstone project.

IMPORTANT: Try NOT to focus on what you would do to fix or correct things in these stores right now. Ask lots of questions about what you see in a non-judgmental way without providing answers or giving ideas. You are **an observer** only.

Notice the various **components** of what you are observing:

- Inputs to the process: information, data, customer requests, device launch, marketing materials, inventory, HQ communications, procedures, something outside the process that is acted on by the remaining following components
- People: the people taking action on the input and involved in the process, those closest to and able to provide the best information about the action(s).
- Methods: the 'how' a process is carried out: what software, what policies and procedures, what steps, what standard actions are used?
- Machines & Tools: equipment, software, internal devices, apps, pens, etc.
- Materials/Time/Resources: things that are used up or consumed in the process.



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- Environment: behavioral, physical, and psychological environments and how they impact what's being done and how it's being done and how the people in the process are impacted by the environment.

Focus: Spend time observing a process in action in several locations. Then step back and consider and include the larger system and outside influences and impacts on the process. Be sure to capture notes and ideas.

By the end of your **T-Mobile Market Observations**, you might feel like you have come away with a hypothesis or an idea (or maybe several ideas) for an area you'd like to focus on, for how we might be able to Move the Needle - on a current goal/target, a customer experience enhancement, a cultural or behavioral environmental factor, a process that isn't working well, or a process that is working well that we should replicate, etc. Awesome! But remember this is a hypothesis only and you need to do some more in-depth research to ensure you aren't jumping too quickly.

Consider this as a starting point for more research and more observation, interviews, and objectively looking at the broader system and impacts. Try to suspend that part of you that wants to jump in, who is the quick, action-oriented, targeting role you usually play.

Start crafting your general **If/Then** hypothesis/idea statement or problem statement to describe an improvement idea(s). It's ok if it's not solid, in fact it shouldn't be...yet. We're going to work together on that during your upcoming L.E.A.D. Performance Workshop.

- **Example:** "If our teams get updated training on how we use Un-carrier behaviors to help them with new customers and sell our most popular plans, **then** we'll sell xxxxxxxx number of postpaid plans this year and surpass our targets from the last two years!"

Before you write an If/Then idea statement, let's focus on observing what we do, how we do what we do, why we do what we do, when we do what we do, and who does what! It's a fun way to really learn about your business!



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What are the **INPUTS** to your process?

Capture information about what the inputs are: information? Instructions? Physical objects, such as inventory or systems or devices? Inputs are acted on by the other components.

How are the inputs provided? When and how often? Who/what team/what business unit is providing the inputs? Is this an 'internal' supplier or customer? Do you (or do the people in this process) have control or influence on what, how, or when they provide the inputs? What can you do or who can you talk to in order to understand this? You may need to reach out and use your network. Who do you know? Start with your cohort and Mentor and see where that takes you.

Hint: The input may be the bread in your toast activity.

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Who are the **PEOPLE** involved in taking action on the process?

Who are the customers to this process -internal and external? Who are the people acting on or 'closest to the action'? Are they the same? If they are internal/external suppliers or internal/external customers to this process, who has responsibility for them? Who can help you with clarity around the people and how they are involved? Don't forget to include those people in your interviews. People 'in the process' and 'closest to the action' can provide helpful info.

NOTE: Be cautious with making judgements too quickly about what they say. Their feedback, their perception is reality to them.

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What are the **METHODS** used to complete this process?

What methods are used here – the HOW? Are methods consistent in various instances? Is it an ‘expectation’ that everyone does things the same? Why or Why not? Look for shortcuts, steps skipped or modified. Does time have anything to do with how someone approaches a process and the tasks associated? What does the training and documentation say about the methods? If it’s a customer facing process, what is the customer’s response to ‘how’ the method is working for everyone? Is the reasoning transparent? Should it be?

Ask lots of questions about the how and why. Watch the ‘action’ closely. Try not to judge, just observe, and consider all the reasons that someone is taking the actions they take.

*Remember that people **WANT** to do a good job. If they aren’t, they are only a small part of the system they are working in. There are many good reasons that they choose to do what they do. Find out what all those reasons might be.*

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What are the **MACHINES**, systems, tools, and software used to complete this process?

What machines, systems, tools, and software are required? Are they used consistently? Do they work well? Why or why not? What happens when they don't work? Are there enough available? What is the training? Are the tools kept up to date? Who has responsibility for them? Who can help you with clarity around their provisioning, use, and upkeep? Watch how people use them and if/how they've created shortcuts, work arounds, or skip steps. Why? Ask lots of questions without judgement!

People 'in the process' and 'closest to the action' are doing the best they can based on expectations and what they've been told and the expectations, methods, machines, materials, and environment they've been given. *Look for hints about that. What would you do?*

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What are the **MATERIALS** consumed by this process – or used up in this process?

What time and energy- both human and tasks - used up in this process? How do we know if it's too long or not enough time? How do customers respond to time and energy expended to help them? What opportunity costs are there of doing things too fast or too slow? What do people involved say is the value of spending the right amount of time? Is it consistent across what you're observing? Are there physical materials such as sample devices and equipment that can't be sold? During covid, there were needs for different and more cleaning materials and PPE. Are there other materials are consumed by a process? Ask questions and be curious about what people think about what they consider 'using up' materials and what they are. (Time, money, resources, lost or gained opportunity, etc.)

Remember: This is what 'the people involved in the process' think. Try not to influence. Ask, listen, take notes.

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What is the **ENVIRONMENT** where the process takes place?

The environment is physical, behavioral, emotional, social, and psychological. This has a large and small impacts on processes. Is the place where people are working dark, light, cold, warm, quiet, loud, clean, cluttered, easy to find and navigate? What do customers feel when they're in the space? Is it tense, fun, efficient, organized, and clean? Do people seem rushed, confused, angry, stressed, comfortable? Why or Why not? Who drives the environment? What is the 'culture'? Who is in charge of the environment? Who is really influencing the environment? Do employees have autonomy to make changes to physical environmental factors? Culture? How often do they get to talk about their environment? Is it enough?

Hint: Environment is a HUGE topic and is challenging to influence its impact. Take your time, pay attention, think, and reflect before you ask, listen, and take notes.

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Performance/Process Improvement Discovery Tools.

The following are a few of the tools you can use to start planning your observation(s), interviews, If/Then Statement, Action Plan, and ideas for Performance/Process Improvement.

Using the [Deming PDSA/PDCA Cycle](#)

[How to Use the Deming Cycle for Continuous Quality Improvement](#)

[PDCA \(Plan Do Check Act\) Continually Improving, in a Methodical Way](#)

Using the [Fishbone Diagram](#):

Also called Ishikawa Diagram and Cause & Effect

[Fishbone Diagram: Determining Cause and Effect](#)

A blank Fishbone Diagram is included on the following page. Feel free to make this tool useful to you, multiple copies, modify the lines and inputs on each of the lines that feed into your problem statement.

Using the [Five Whys](#)

[Five Whys: Wikipedia](#)

Making Toast

Don't forget to revisit this activity from your L.E.A.D. People workshop. Also called an Affinity Diagram, this activity (nodes and links and post-it notes not the toast!) is a great a way to help clarify steps of a process. It's especially useful when the process is complex or there are a variety of perspectives on what's happening.

Reach out to your Sr. Leadership Development Trainers:

Art Lusanaxay (Art.Lusanaxay@T-Mobile.com) and Amy Priest (Amy.Priest@t-mobile.com) and/or your Process Improvement SME Jeri Oien (Jeri.Oien1@T-mobile.com) to help you customize the activity or talk through the steps to apply it to the work you are doing.

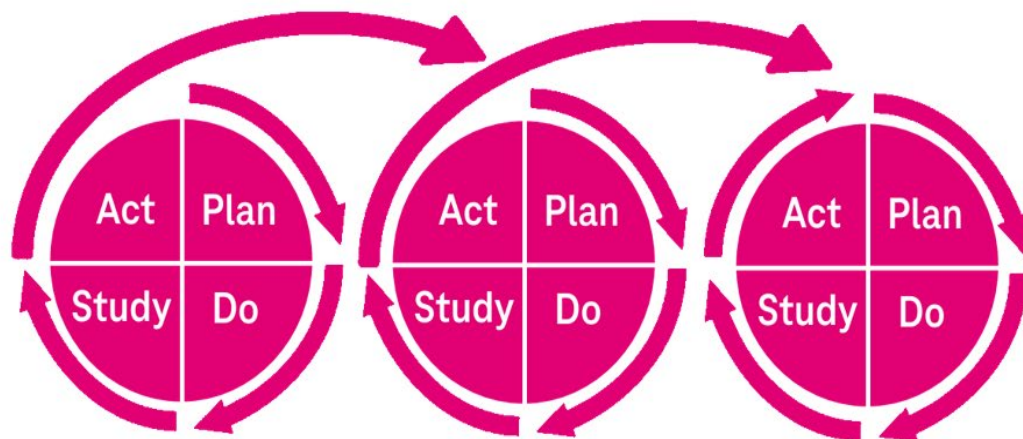
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Plan Do Study Act (PDSA) or Plan Do Check Act (PDCA)

PDSA is an iterative, four stage problem-solving or continuous improvement model. As you can see it never stops as it is used to continuously:

1. Plan your improvement intervention.
2. Do or carry out your plan– typically on a small scale
3. Study what happens across all components, inputs, and outputs. Also, look for impacts to the larger system
4. Then take action on what you learn from your ‘study’ of the impacts to the system.
5. Consider optimizing a system vs. maximizing a system and adjust accordingly.
6. Repeat...
7. It may take multiple cycles as you assess your ideas and focus on different improvement opportunities

PDSA Cycle:



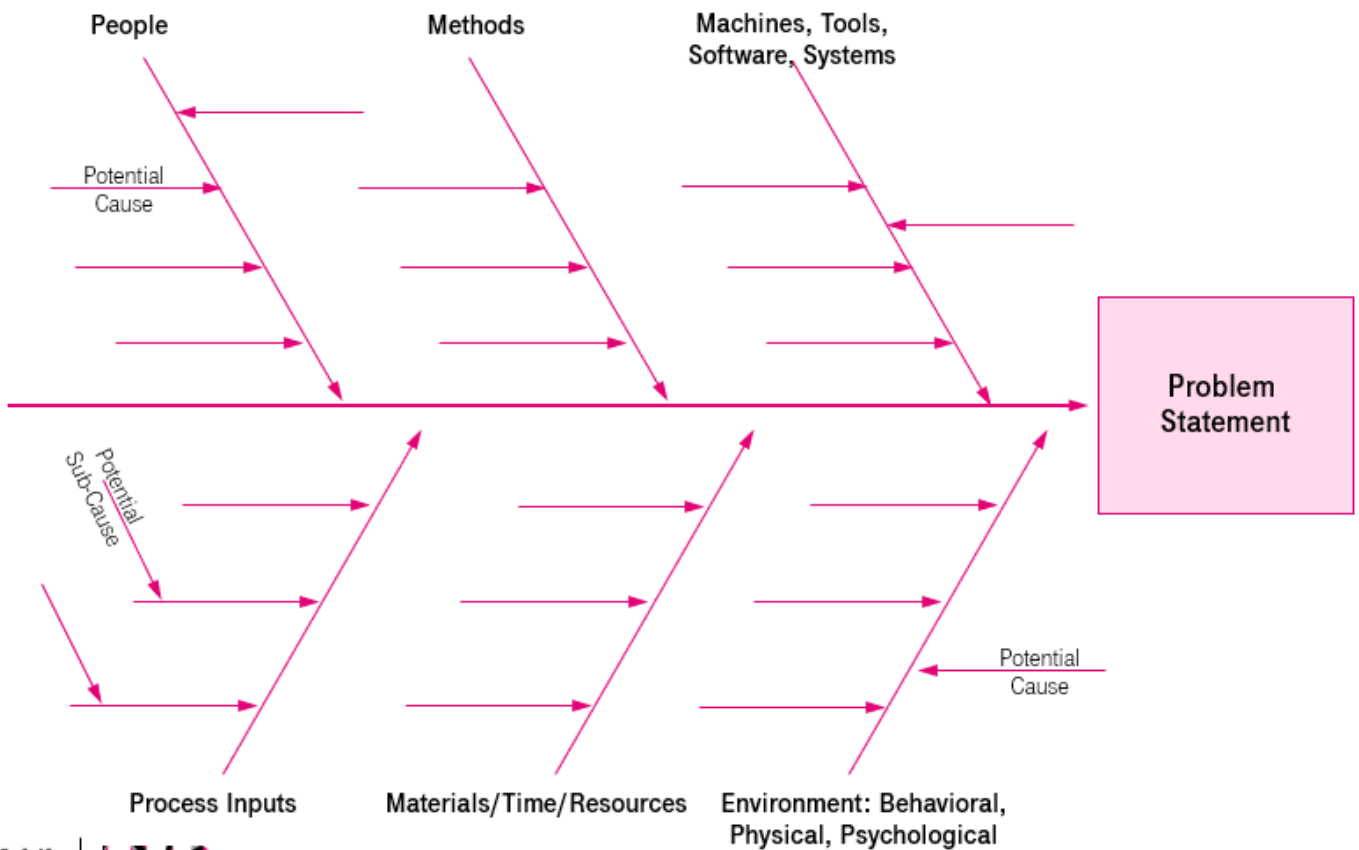
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Fishbone Diagram

Use this to help you categorize and prioritize the various potential causes of your root problem/root cause. **Use it as often as needed.** The only thing that should remain the same on every diagram are the headers. This starts with Process Inputs and the components that 'ACT' on the inputs: People, Methods, Machines/Tools/Software/Systems, Materials/Time/Resources- consumed or used up in the process, Environment- Behavioral, Physical, Social, Cultural, Psychological, etc.

Cause & Effect, Fishbone Diagram

Sort and prioritize potential causes to better understand the potential **root cause** of your problem statement. Used in conjunction with the '5-whys' can help narrow the focus of a process intervention.



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5-Whys Instructions:

The 5-Whys is a strategy often used after an issue has been identified.

By asking "Why?" five times successively, can you delve into a problem deeply enough to understand the ultimate root cause - asking five times is fairly typical. However, more than five whys may be required for more complex problems or repeating the five whys may be required if there are multiple 'branches' to a problem.

1. State the problem you have identified as a strategic problem to potentially focus your work on.
2. Start asking "why" related to the problem you've identified. Keep asking "why" in response to each suggested cause.
3. Ask as many whys as you need in order to get insight at a level that can be addressed. You will know you have reached your final "why" because it does not make logical sense to ask "why" again.

IMPORTANT: Guard against using the 5-Whys questions on their own to avoid a narrow focus or bias. Your goal is to get to an objective 'root' to why a problem should be addressed

5 Whys Worksheet

Define the Potential problem:

Why is it happening?

1.

Why is that?

2.

Why is that?

3.

Why is that?

4.

Why is that?

5.

Why is that?

Continue if needed...

Don't list 5 different reasons; Go deeper on reason #1

If your last answer is silly or something you can't control, go back up to the previous answer. This is how you know you've asked "why" enough.

Potential Action:



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NOTES: Planning Meeting...

...with your Mentor, Sr. Leadership Development Trainers, Process Improvement SME

Task: Schedule a meeting with your mentor, Sr. Leadership Development Trainers, and/or Process Improvement SME to connect and talk through your current thoughts and work on observation activities.

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PROCESS OBSERVATION GUIDE

NOTES: Planning Meeting...

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STRETCH ASSIGNMENT:

IF/THEN STATEMENT & ACTION PLAN: DEVELOPMENT & ANALYSIS

L.E.A.D. PERFORMANCE

MONTH 3 Workshop

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MONTH 3 Workshop

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STRETCH ASSIGNMENT:

IF/THEN STATEMENT & ACTION PLAN: DEVELOPMENT & ANALYSIS

Change of Scenery

Stretch Assignment Introduction

Performance/Process Improvement Opportunity:

Working with HQ team(s) and contacts, learner uses systems thinking to holistically and objectively identify and research a performance or process improvement opportunity, potentially in (but not limited to) areas of our business. Talk with your Director/Stretch Leader, Mentor, Sr. Leadership Trainers. Consider the Strategic Imperatives and Corporate Priorities. How can you move the needle?

- Customer Experience – customer interactions, accounts, transfers, promos, in-store merch, community connection and outreach, etc.
- Store and Market Operations – inventory, merchandising processes, standard operating procedures, store hour changes, facilities, etc.
- Systems & technology – systems and updates, REMO/hardware, consistent and effective use of technology, etc.
- Other – communication clarity/questions, training, compensation, culture, DE&I, teamwork, support, etc.

The improvement opportunity should include and explore connections and impacts to the broader business and organization, links to HQ and with HQ contacts and teams. This requires learners to stretch to new levels of leadership, networking, outreach, and influence. Skill development includes objective research (observations, interviews, online study, and brand comparisons), hypothesis and assumption clarity and confirmation, intervention design, influence to generate buy-in, project management considerations, analysis, testing, execution and evaluation planning, and success tracking. Additional cycles of confirmation and clarity may be required with your Stretch Leaders.

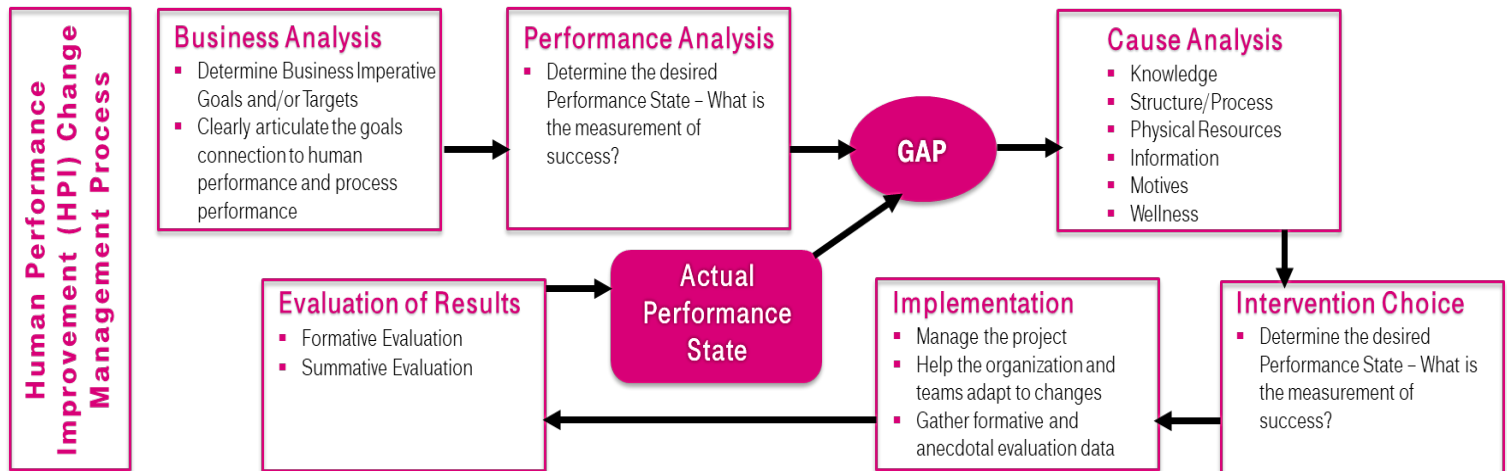
Learners will apply all previous learning, background study, If/Then statements, and Strategic Action Plans created and refined during Month 3 in the L.E.A.D. Performance workshop as a starting point.

Learners proactively engage L.E.A.D Mentor, Sr. Leadership Development Trainers, Process Improvement SME, and Directors/Stretch Leaders and Managers as necessary - clarify and confirm steps, impacts, and proposed intervention 'solution(s)' using process improvement tools, research, observations, interviews, and data. Learners partner with teams, leaders, colleagues, and select team members.

STRETCH ASSIGNMENT:

IF/THEN STATEMENT & ACTION PLAN: DEVELOPMENT & ANALYSIS

Capstone will include detailed reporting and presentation of personal learning, the improvement opportunity, plan, and results. Presentation should also include recommendations for further investigation if needed, expansion if appropriate, and additional improvement opportunities that come to light during this assignment.





STRETCH ASSIGNMENT:

IF/THEN STATEMENT & ACTION PLAN: DEVELOPMENT & ANALYSIS

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POSTCARDS FROM THE ROAD: CAPSTONE PLANNING

Collecting souvenirs along the way:

Prep for your Executive Summary & Capstone Presentation

One of the most exciting parts of L.E.A.D. is the opportunity to share details in your Executive Summary and discuss everything about your road trip during the Capstone Presentation at the end of your program and Stretch Assignment.

This will include telling a compelling story to Leadership; telling them about all your hard work, what you've learned, and the valuable ideas and actions you would like to take further. You'll have a chance to learn more about the specifics of the Capstone during the Stretch & Recharge Midpoint Event.

As you are working on your L.E.A.D. Performance Process Observation and lead into your Change of Scenery – Stretch Assignment, it will be important to make notes, not only about the topics and activities you are working on but also about your whole learning experience.

If you haven't started 'noodling' on it yet, now is the perfect time to start thinking about what you'll want your story to be. You'll want to collect ideas, visuals, data, information, pictures, stories, anecdotes, suggestions, etc. to tell your personal story. Do you remember the Leading Yourself section of the program focused on Selling Your Vision? This is one more place where you can apply what you learned and build a story to highlight your focus and hard work as well as potentially inspire action on the part of the leaders you are speaking to.

You have a unique view and a new perspective and mind shift to share, and those leaders can also learn from your experience and are excited to hear about it.

HOW TO Use the following Reflections and Worksheet pages:

Your next ~90 days are going to be focused on this potential Performance/Process Improvement Opportunity and all the research, interviews, and observations you do. A great way to process your exploration and thinking?

Use this guide to collect ALL the questions and ideas that pop into your head. Track the information that you discover and keep it here to reference as you work on your If/Then statement and Action Planning. Take everything you collect and visually mind-map, outline, draft ideas, add quotes and sketches, brainstorm. Use color, play with images, include stickers if you want. Ask for input and feedback from your peers, mentors, Leadership trainers. Brainstorm how you want to prioritize what you



POSTCARDS FROM THE ROAD: CAPSTONE PLANNING

are learning. If you need bigger paper or a whiteboard is more your style, use that and then take pictures!

Do what you need to help you with your **Stretch Assignment** as well as starting your plan for your **Postcards from the Road Presentation**. This will give you a head start and set you up for success!

This is your journey, your process, YOUR story!



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NOTES: PLANNING MEETING

Task: How long has it been since you got some creative input, feedback, support, brainstormed an idea? Schedule a meeting with your Director/Stretch Leader, Mentor, Sr. Leadership Development Trainer, PI SME, or cohort peers to connect and talk through what you are working on.

Use this space to make notes about the meeting. Be sure to capture information and ideas you may want to try out during your stretch assignment.

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NOTES: PLANNING MEETING

Task: Would it be valuable to schedule a meeting with your Director/Stretch Leader, Mentor, or another leader to connect and talk through where you are on your stretch assignment?

Use this space to make notes about the meeting.

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WORKSHEETS:

Task: Track and collect recommended contacts, teams, resources, C2 document links, Cornerstone trainings, article links, helpful tips, systems, etc. Anything that might be helpful to your opportunity and your Capstone

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WORKSHEET:

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WORKSHEET:

Optional Use: Collecting Valuable Data Points, Things to track, Contact Names, Phone Numbers, Addresses, etc.

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WORKSHEET:

Optional Use: Collecting Valuable Data Points, Things to track, Contact Names, Phone Numbers, Addresses, etc.

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