

# Effective EDGE™ for Professionals



Mastering Life & Work Flow  
Using Lotus Notes®



effectiveedge

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# Intro: Removing E-mail Distractions

## **TO REMOVE E-MAIL DISTRACTIONS:**

1. Click on FILE.
2. Click on PREFERENCES.
3. Click on the + or > next to the MAIL option.
4. Click on the SENDING AND RECEIVING option.
5. Uncheck the options:
  - Play a sound
  - Show a popup
  - Slide in a summary
  - Display an icon in the system tray
6. If available, check the box next to NO ALERT.
7. Click OK to save and close.

# Intro: Home Page View

## **TO DOCK THE OPEN LIST:**

1. Choose VIEW, DOCK THE OPEN LIST from the menu.
2. Choose VIEW, RIGHT SIDEBAR, THIN from the menu.
3. Right click anywhere on the Open list, and select USE LARGE ICONS.

## **TO SET UP THE DASHBOARD VIEW:**

1. Click on the HOME tab.
2. Click the down triangle (▼) next to the CLICK HERE FOR HOME PAGE OPTIONS command.
3. Click CREATE A NEW HOME PAGE. In the Give your page a name box, enter Home View. Click NEXT.
4. Select the Frames option. Click NEXT.
5. Uncheck the boxes next to Inbox and Include Preview Pane, then check the boxes for Calendar and To Do List.
6. For frame layout, click NEXT to keep the default selected layout.
7. For content placement, verify Calendar is on the left, and To Do List is on right. Click NEXT.
8. Uncheck the "Display the launchpad option." Check mark the "Show action bar buttons" option. Click NEXT.
9. Click FINISH.
10. On the To Do frame, drag the bottom horizontal scroll bar half-way to the right until you see the column header, "Category." Drag and drop "Category" to the left of "Due Date."

# Intro: Calendar Setup

## TO SETUP THE RECOMMENDED CALENDAR VIEW

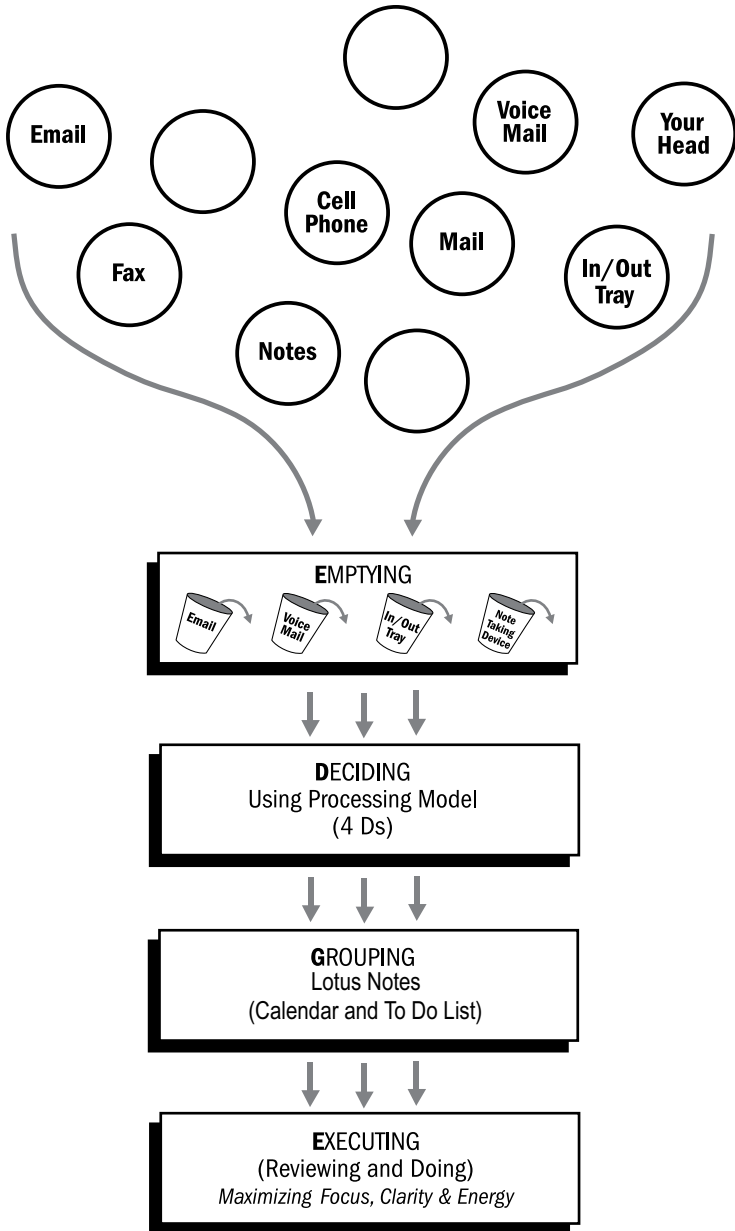
1. Click the Calendar icon on the Open list.
2. Expand the Views List and choose ONE DAY.
3. From the Tool Bar menus, choose MORE > PREFERENCES.
4. On the Views Tab, check mark the following:
  - Ask me before deleting Calendar and To Do documents
  - Display New Unprocessed Notices
  - Process canceled meetings automatically/remove from calendar
5. Uncheck DISPLAY TO DO ENTRIES so they don't display on the calendar. They will display on the To Do List.
6. Click the Notices tab. Under CALENDAR NOTICES IN MAIL VIEWS, check mark the following options:
  - Remove Meeting Notices from my inbox after I process them
  - Display unprocessed meetings in the New Notices MiniView
  - Don't display calendar Documents in the All Documents mail view
  - Don't display meeting invitations in the Sent Mail view
7. Click the MAIL tab, then click BASICS. The OUTGOING MAIL CHECKING options are personal preference. Under VIEW AND FOLDER MANAGEMENT:

For WHEN I DELETE A COLLAPSED CONVERSATION, choose ASK ME from the drop down arrow.

For WHEN I DELETE ANY DOCUMENT IN THE SENT VIEW, choose REMOVE WITHOUT DELETING.

For WHEN I DELETE A CALENDAR DOCUMENT from any Mail view or folder, choose REMOVE WITHOUT ASKING.
8. Click OK to save changes.

# Emptying: EDGE System



# Emptying: To Do vs. ACTIONS

## TO CREATE A TO DO:

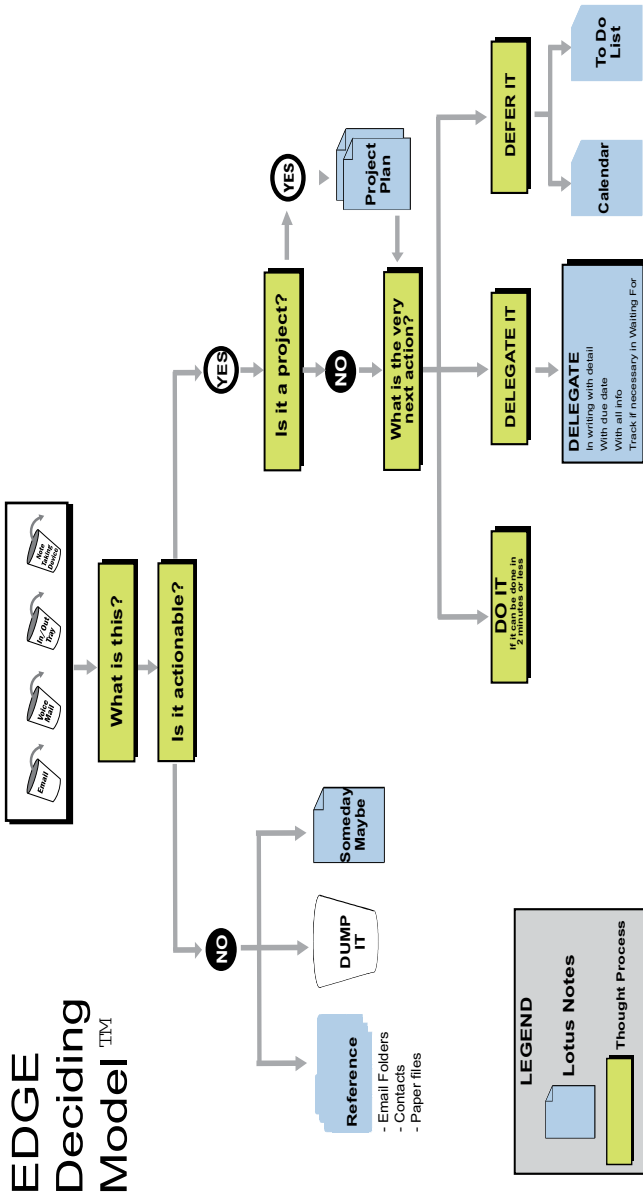
1. From the new Home Page, on the right hand frame, choose NEW TO DO ITEM.
2. Type the title of the To Do in the Subject text box.
3. Select the due date, if there is one, from the Due By field.
4. If your To Do is recurring from time to time, click REPEAT and set the pattern.
5. Click the SAVE AND CLOSE button on the Toolbar to save your changes.

*Note: A To Do can only be set to repeat when it is first created.*

To-Dos vs. Actions	
TO-DOs:	ACTIONS
<ul style="list-style-type: none"> <li>✘ Come directly from brain</li> <li>✘ Specific or vague in nature</li> <li>✘ No thought process applied</li> <li>✘ Has dependencies</li> </ul>	<ul style="list-style-type: none"> <li>✔ Action verb at beginning</li> <li>✔ Can see yourself doing it</li> <li>✔ Thought process applied</li> <li>✔ Independent</li> <li>✔ One sitting to complete</li> <li>✔ Next strategic step</li> <li>✔ Specific</li> </ul>
<p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>✘ Training for Marketing</li> <li>✘ Clean garage</li> <li>✘ Weekly report</li> </ul>	<p><i>Examples:</i></p> <ul style="list-style-type: none"> <li>✔ E-mail Fred re: training</li> <li>✔ Schedule Saturday with spouse to purge old items in garage</li> <li>✔ Measure wall for shelving</li> <li>✔ Talk to Joanne re: report format</li> </ul>

*The more specific we are, the faster we can engage with a to do.*

# Deciding: EDGE Deciding Model





# Deciding: Where ACTIONS Go

<b>When to use Calendar vs. To Do List</b>	
<b>CALENDAR</b>	<b>TO DO</b>
<p><i>Time Specific: AT</i></p> <p>Example: Lunch Meeting with Steve AT 12 pm.</p> <p><i>What: Appointment</i></p>	<p><i>Due By: BY</i></p> <p>Example: Complete survey BY December 15th.</p> <p><i>What: To Do with Due Date</i></p>
<p><i>Day Specific: ON</i></p> <p>Example: John PTO ON Monday</p> <p><i>What: All-Day Event</i></p>	<p><i>No Due Date: NO</i></p> <p>Example: Research new computers.</p> <p><i>What: To Do with NO Due Date</i></p>

## Grouping: Suggested Categories

**.ACTIONS:** The word Action denotes a generic name for the list of actions which you must take. It represents the very next physical, do-able step on an item that you must complete to move forward. Your 'Actions' list is the main list.

**.CALLS:** (OPTIONAL) Many of us spend a significant amount of time on the phone. If this is true for you, then this category may serve you well. "Calls" is a subcategory of **.ACTIONS**. When entering a call, enter the person's name, subject matter, and phone number, then categorize the task as **.CALLS**.

**..\_\_\_\_\_ (INSERT YOUR MANAGER'S NAME IN THE BLANK):** In the blank space enter your manager's name (..Christina). This is where you capture non urgent items to discuss with your manager either in person or on the phone.

**..TEAM:** If you have several team members that you frequently speak with, this is a place to capture those non urgent things that you need to discuss with them and need to follow up on. If you have regular 1:1s with your team, track items here to discuss. In order for this list to work most effectively, begin each new task item with the name or initials of the individual, followed by the task description. This allows you to easily review items when you are talking with each of your team members.

**..WAITING FOR:** This category reflects information promised to us by someone else. Until they perform their work and get back to us, we cannot move forward with that item. This allows us to keep a clear head about what we can and cannot act on because we are waiting for someone else. Use the name or initials at the beginning of the subject line.

## Grouping: Suggested Categories

**...ERRANDS:** This list represents the stops outside of the home or office that you must take. For instance you can add: "Return shoes to department store," or, "Buy Anniversary card."

**...HOME:** This list is made up of actions that we need to take while at home. We frequently are reminded of things that we must do at home when we are at the office. However, we cannot do anything about them. This list helps us to keep focused while at work and provides us with one place to look for the things that we need to take care of when we are at home.

**...READ/REVIEW:** If your work or life requires significant reading and reviewing; whether it's legal documents, periodicals, magazines, internal memos, e-mails and e-mail attachments, etc.; it's easy to become overwhelmed with the sheer volume. This list allows you to log the important reading so that it is distinguished from other reading, such as interest & leisure.

**...SOMEDAY/MAYBE:** This category list is for the ideas, future projects or "maybe someday I'll get to that, but not now" list. It is important to keep the ideas and creativity flowing. However, there is little to do with these items except to keep them in an area to 'incubate.' There is a clear line between this list and all your other lists. You have not committed the time, energy and resources needed to fully deliver on this list – at this time.

**....PROJECTS:** This category contains the name, description and outcome of the project commitment. Because this is the 'big picture' for us, we have elevated it to the top of the list by placing '....' in front of the word Project. We all need to be reminded of the 'big pieces' that we have around us. For some of us, we may think of them as projects, focuses, priorities, etc. Keeping this list of projects creates a reminder for you to keep those big picture goals moving forward. Great for any task that has 5 or more steps.

# Grouping: Creating Categories

## TO SET UP NEW CATEGORIES:

1. Click on the File Menu then PREFERENCES.
2. Click on CALENDAR AND TO DO from the list.
3. On the Entries tab, type in each category in the Categories text box.
4. When all categories have been entered, click OK.

Note: A category will not appear in your To Do list until you have at least one To Do assigned to that category.

## SUGGESTED TO DO CATEGORIES:

.Actions  
.Calls (optional)  
..\_\_(Manager's Name)  
..Team  
..Waiting For  
...Errands  
...Home  
...Read/Review  
...Someday/Maybe  
....Projects

## Grouping: To Do List View

### **TO VIEW THE TO DO LIST BY CATEGORY:**

1. On the Open List, click on the To Do icon (the green check mark on the clipboard).
2. Click the BY CATEGORY option in the Navigation pane to the left to view the To Dos by Category.
3. Click the arrow to expand or collapse a category to see your listed To Dos.  
*\*You will see both complete and incomplete To Dos in the BY CATEGORY view.*

### **TO CATEGORIZE A TO DO:**

1. Double-click on the To Do to open the item.
2. Click the blue Category hyperlink and check mark the appropriate category. (If you don't see the hyperlink, click DISPLAY at the top of the To Do and select CATEGORY.)
3. Once the category is selected, choose OK.
4. Click SAVE AND CLOSE on the toolbar.

### **TO VIEW COMPLETED TO DOS:**

1. On the Open List, click on the To Do icon (the green check mark on the clipboard).
2. From the Navigation pane, select the COMPLETE view.

## Grouping: Five Steps to Getting the EDGE on Projects

1. Write down the name of the project.
  - Open a new To Do and write the Project name.
  - Change the category of the To Do to ....Project.
  - Add a due date (if there is a real due date).
2. Write the desired outcome statement in the description box.
  - A clear statement of what the project will look and feel like when completed.
  - E + Motion - We need to be fully engaged. When we add our emotion and hearts, projects move more smoothly because we are using our “whole self.”
  - Outcome Focus - We focus on what we want to identify with. The Outcome Statement has the power to draw to us what we need.
3. Perform a Mind Sweep exercise, listing all the To Dos for the project.
4. Select which is the next actionable item to add to ACTION category.
  - a. Highlight the action from your Mind Sweep list.
  - b. Right-click on the highlighted text and choose COPY.
  - c. Click the NEW ITEM icon on the To Do list Toolbar.
  - d. Right-click in the Subject text box and choose PASTE.
  - e. Add a DUE DATE and CATEGORY to the Task.
  - f. SAVE AND CLOSE the action for that project.

*(continued on the next card)*

## Grouping: Five Steps to Getting the EDGE on Projects

5. To insert a link to an e-mail inside of your To Do:
  - a. Move the e-mail out of the inbox to a reference folder.
  - b. Click on the e-mail to select it, then click on the EDIT menu, then choose COPY AS TABLE.
  - c. Open the Calendar or To Do item in which you want to add the e-mail link.
  - d. Right-click in the Description text box of the Calendar or To Do item and choose PASTE from the drop-down menu. Left click on the Document icon to open the link.
  - e. Click SAVE AND CLOSE to save the To Do.
  - f. Do not delete or archive the original e-mail or the link will no longer work.

## Grouping: Adding Contacts

Don't keep an e-mail just to keep someone's e-mail address - store it in your Contacts. You can keep addresses, phone numbers, and e-mail addresses with their Contact record. You can even store notes about your last conversation, access codes, directions or other details in the notes section of the Contact record.

Lotus Notes contacts are stored in a separate address book file and do not take up space in your mailbox.

### **TO CREATE A CONTACT:**

1. Click the Contacts icon on the Open list.
2. Click the NEW button on the Toolbar.
3. Enter the appropriate contact information. You can click on the section heading (e-mail, phone numbers, etc.) to add other detailed information about the contact.
4. Click on the Comments tab to add notes to the contact record.
5. Click SAVE AND CLOSE to save the Contact.



# Grouping: Communication Effectiveness

	Chat/ Text	E-mail	Collaboration Tool	Call	Virtual Meeting	In Person Meeting
Quick Question	X					
Urgent Question/ Issue				X		
Sharing Updates		X	X			
Sharing Files			X			
Group Decision			X		X	X
Heated/Difficult Discussion				X		X
Performance/ Feedback						X

## Grouping: E-mail Effectiveness

**Below are a few key tips to help make e-mail more effective:**

- Consider whether the best medium is e-mail. In some instances, i.e., urgent, too complex, personnel/confidential issues, too much emotion is present or emotion needs to be communicated – then it is better to speak face-to-face or use the telephone. Sometimes Instant Messenger services can be used for urgent matters or “two minutes or less” communications.
- Process e-mail periodically rather than constantly. Practice stretching your batching intervals - 30 Mins, 60 Mins, etc.
- Make the Subject Line reflective of the action and subject (e.g., Action Requested, FYI or For Your Records).
- Use CC and Reply All only if absolutely necessary.
- Be appropriate. Ask yourself if you could look them in the eye and say the same thing.
- Only include someone in the To line if a response is expected.

## Grouping: E-mail Effectiveness

*"We teach people how to treat us."*

### Other good tips include:

- Identify the players by name (no Dear Sirs: on e-mail).
- No jargon, acronyms, slang or colloquialisms, especially when English might be their second language.
- Ask for clarification rather than assume.
- Distinguish between fact and opinion.
- Do not respond to gossip.
- Be mindful of what you send, as your e-mail might be forwarded to others.
- Assume the best intentions of people.
- Be curious.
- Avoid blaming.

*\*Consider picking ONE tip to focus on each month, and enroll your whole team at your next team meeting.*

### WRITING EFFECTIVE E-MAILS

#### PASS

*"Take time on the front end to save time on the back end."*

- **Purpose** - Why are you sending it?
- **Actions** - What do you want them to do?
- **Specifics** - How do you want it done and by when?
- **Supporting resources** - Where are the tools or info they need to complete the Action?

**Reminder:** Most people scan e-mails. You only have 8-10 seconds to convey your message.

*Momma used to say, "A stitch in time saves nine!"*

## Grouping: Instant Messaging Chat Effectiveness

- **Mute the chime.** Most chat applications provide multiple ways for you to be notified of a new conversation. Opt for the pop-up notification over the chime as it is less disruptive.
- **Show your status.** Reflect your availability in the IM tool so that others know your availability. When necessary and appropriate, sign out to help focus on completing work. Remember to sign back in.
- **Check availability.** Be sure to check the available status of the person you want to chat with before you send a message.
- **Keep conversations short – use the 2 minute rule.** Escalate long or complicated conversations to email or phone. If you are sensing tension or a misunderstanding has occurred, switch to video chat or phone. No actions should be requested on IM.
- **Respect their time.** Just because the recipient's status was marked available doesn't mean they have time to engage in conversation immediately. Don't expect an immediate reply. If you have something urgent to communicate, the phone is your best resource.
- **Chat professionally.** Even though you are using chat, you are still conducting a professional conversation. Don't say anything in chat that you wouldn't say in person or in public. Be succinct, but clear in your messages and remember that in electronic messages, all capital letters is the equivalent of shouting.
- **Focus - Don't multi-task.** It's difficult to have more than one successful conversation at a time, whether that conversation is in person or in a chat window. Limit your chat conversations to one at a time whenever possible.

## Grouping: Meeting Effectiveness

- Aim to spend no more than 60% of your day in meetings.  
Decline invites strategically, according to priority.
- Share the agenda and clear desired outcome of the meeting before and/or at the start of every meeting.
- Assign someone to track/record actions; distribute within 24 hours after meeting.
- Assign a time keeper, action tracker and facilitator (typically the event organizer).
- Schedule meetings for no longer than 1.5 hours. This is the longest amount of time that people can focus (if the meeting needs to be longer, take breaks every 1.5 hours).
- If meetings frequently start late/run over in your company, ask yourself what you can do to help shift that culture.

### **When Booking a Meeting:**

- State the meeting objectives and agenda clearly in the invite.
- Invite the “right” people: key attendees who will contribute and can make decisions.
- Talk to the assistants of key players. Admins know the most about their managers’ schedules, and can recommend when the most productive meetings can be held.
- Schedule meetings consecutively or in blocks to allow for less interruption in the day.
- Allow lead time: giving attendees at least two weeks’ notice will ensure maximum attendance.
- Send a reminder and desired outcome for the meeting the day before to further enhance your attendance.

## Grouping: Mailbox View

### **SETTING UP THE PREVIEW PANE:**

1. Click the inbox icon on the Open list to view your e-mail inbox.
2. Click the up triangle (▲) on the preview command at the bottom of the screen to view the Preview pane.
3. To change the location of Preview pane, click the SHOW button in the top right corner of the mailbox. Select PREVIEW ON BOTTOM OR SIDE.

### **TO VIEW YOUR INBOX BY CONVERSATION:**

1. Click the Show button in the top right corner of the mailbox.
2. Choose Conversations.

### **TO VIEW ALL OF YOUR DOCUMENTS:**

1. Click the Inbox icon on the Open list.
2. Click the ALL DOCUMENTS option in the navigation pane on the left.

Note: Any item deleted from the ALL DOCUMENTS will be permanently deleted.

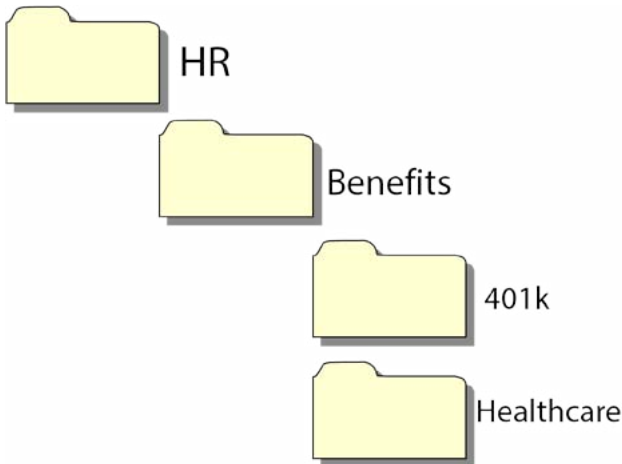
# Grouping: Creating E-mail Folders

## TO ADD A FOLDER OR SUBFOLDER:

1. From the Mail view, right click on INBOX on the left panel.
2. Select NEW FOLDER, type in the name for the new folder, and select OK.

- Consider using PROJECTS and REFERENCE as file cabinet 'drawers.'
- It is recommended to have no more than 2 tier levels deep under each main level folder.
- Remember the red dots? How can you more tightly consolidate your folder list? Look for common themes and find a way to group those.

An Example:



## Grouping: Archive Folders

Your system administrator may set a maximum mailbox limit for your Notes account on the mail server. As retention policies frequently change, please check with your supervisor for current document retention recommendations. If permitted, archive folders are separate files that are not part of the main mailbox and can be created to manage information that needs to be removed from the server mailbox due to the size limit.

### **TO CREATE AN ARCHIVING FOLDER:**

1. Click on the Inbox icon on the Open list.
2. Choose ACTIONS, ARCHIVE, SETTINGS from the menu.
3. Click the CRITERIA tab and click the CREATE button to select the settings for how you want to archive the database.
  - Enter a name for your archive.
  - Check mark ENABLE THIS CRITERIA.
  - Click the SELECTION CRITERIA button and change the criteria settings to match your needs. Choose OK.
  - Browse for the archive file location in the WHAT SHOULD HAPPEN TO THE SELECTED DOCUMENTS section.
  - Choose the REMOVE ARCHIVED DOCUMENTS FROM THIS APPLICATION option.
4. Choose OK to save the changes.
5. Choose ACTIONS, ARCHIVE, ARCHIVE NOW to perform the first archive.

*(continued on the next card)*



## Grouping: Archive Folders

### **TO ARCHIVE AN ITEM:**

1. Select document you want to archive.
2. Choose ACTIONS, ARCHIVE from the menu.
3. Select ARCHIVE SELECTED DOCUMENTS.
4. Choose the appropriate archive folder and select OK.

### **TO VIEW THE ARCHIVED FILE:**

1. View the e-mail Inbox.
2. In the Navigation Pane, click on the ARCHIVE option.
3. Select the Archive folder you want to view. Notice that the label on the Document tab and the Document title both indicate that you are now in the Archive view.

## Grouping: 4Ds for E-mail Processing



- **DELETE** OR FILE IT
- **DO** IT IN 2 MINUTES OR LESS
- **DELEGATE** IN WRITING WITH SPECIFICS AND A DUE DATE, THEN COPY THAT E-MAIL REQUEST INTO A NEW TO-DO AND PLACE IN 'WAITING FOR' CATEGORY
- **DEFER** TO A CALENDAR OR TO-DO ITEM BY COPYING INTO NEW

### **TO CREATE AN ACTION FROM AN E-MAIL:**

1. Using the EDGE Deciding Model, choose whether the ACTION belongs on your CALENDAR (do ON a certain day, and/or AT a certain time) or on your TO DO LIST (due BY or NO due date).
2. Right-click on the e-mail and choose COPY INTO NEW/CHOOSE CALENDAR or TO DO.
3. Another option is to drag the e-mail directly on top of the calendar or to-do icon on the Open list.
4. Edit the subject line to reflect the ACTION, fill in any detail.
5. Set the appropriate options for the To Do or Calendar entry. Don't forget to select a category if you created a To Do.
6. Click SAVE AND CLOSE.
7. Delete or file the original message from the Inbox.

## Grouping: 4Ds for E-mail Processing

### **TO INSERT AN E-MAIL LINK INTO AN EXISTING ITEM:**

1. Move the e-mail out of the inbox to a reference folder.
2. Click on the e-mail to select it, then click on the EDIT menu, then choose COPY AS TABLE.
3. Open the Calendar or To Do item in which you want to add the e-mail link.
4. Right-click in the Description text box of the Calendar or To Do item and choose PASTE from the drop-down menu. Left click on the Document icon to open the link.
5. Click SAVE AND CLOSE to save the To Do.
6. Do not delete or archive the original e-mail or the link will no longer work.

### **TO REPLY TO AN E-MAIL FROM A TO DO:**

1. Right-click onto the To Do and choose COPY INTO NEW/ MESSAGE.
2. Edit recipients, subject line, and header as needed.

## Executing: Beginning the Day Deliberately

*“How we start our day can set the tone for our whole day.”*

- Perform a Mind Sweep.
- Review your Home Page to ensure that both the time specific and date specific agreements can be kept.
- Ensure that you are prepared for any meetings (i.e., agendas, paperwork, directions, etc.)
- Review .Actions list for any key upcoming actions due.
- Set an intention for the day.
- Begin the day!

## Executing: Doing & Prioritizing

### Doing, the Critical Piece

- Manage from your lists – not your head.
- Review lists as frequently as needed to keep work flowing.
- Acknowledge completion of items and move quickly to the next ACTION.
- Handle things as they show up – don't wait until they blow up!
- Create a mind set that you will get it done!
- Ask "How can I get this done in 2 minutes or less?"
- Focus vs. multi-tasking.

### Prioritizing & TEST

- Use the TEST criteria to make moment by moment choices throughout the day:
  - **Time** (How much time do you have?)
  - **Energy** (How much energy do you have?)
  - **Situation** (Location, Context)
  - **Top Level** (What is the highest leverage action I can take at this moment?)
- Capture everything in one place so that you can see and know what you have to take care of.
- Ask the question, "Is it actionable?" with each new piece of information you receive.
- Take action on items that require 2 minutes or less and delegate to remove another 30% to provide quick responses and manage the workload.

## Executing: The Weekly Recharge

### **PROCESS YOUR NOTES & VOICE MAIL**

Review meeting notes, items from in/out tray, notes scribbled from conversations, etc. Insert any action items (actions, calls, review, waiting for) into the To Do list as appropriate.

### **E-MAIL**

Process any outstanding e-mail, leaving your inbox totally clear, using the 4D's.

### **CALENDAR**

- **Prior Week:** Review in detail prior week's calendar. Acknowledge completed items!
- **Upcoming:** Overview upcoming calendar events – long and short term. Capture any action items needed to prepare for upcoming events. Review upcoming week to ensure 100% success can be achieved. Renegotiate any events or action items if necessary.

### **REVIEW PROJECT LISTS**

Evaluate the status of each project, goal and outcome ensuring at least one current action item is listed for each. Remember, the more you review your outcomes, the greater the likelihood that you will achieve them!

*(continued on next card)*

# Executing: The Weekly Recharge

## **MIND SWEEP**

Add to To Do list any Actions, Projects, Waiting For, Someday/ Maybe, etc., that are in your head.

## **CHECK “NONE” & “DRAFTS”**

E-mail in drafts and uncategorized items on the To Do list can create leaks in the system. Make sure e-mails have been sent and To Dos categorized.

## **REVIEW ACTIONS FROM ALL CATEGORIES**

Mark off completed items from each of the action lists and drag to completed items folder or delete.

Review reminders of further action steps to add to the list. Celebrate completions!

## **REVIEW PAPER FILES & SUPPORT FILES**

Browse through all work-in-progress support materials to trigger new actions. Remove material no longer needed.

## **REVIEW “SOMEDAY/MAYBE” LIST**

Scan this list to see if there is anything that you are now willing to commit the time, energy and resources to achieving.

## **BE CREATIVE & COURAGEOUS**

Any new, wonderful, hare-brained, creative, exciting, thought-provoking, risk-taking ideas you are ready to add into your system? Is there anything else you need to be reminded about? If so, add to your system.

## **NOW GO HAVE FUN!**

# Appendix: Resources

## More from Effective Edge™

Congratulations! You've now experienced the transformational work of EDGE for Professionals™. Our mission at Effective Edge is to inspire our clients by giving them the tools to live their best life. We also offer programs of this quality for teams and leaders that improve productivity and accelerate results.

### Individuals

Check out our website at [EffectiveEdge.com](http://EffectiveEdge.com) for more resources to support you and keeping your EDGE System going strong. We offer programs that support you in being more effective and efficient in a sustainable way.

### Teams

Collaborating together and delivering results seamlessly can be a challenge. We support teams in having effective conversations and constructive dialogue, in clarifying roles and responsibilities, driving innovation and creativity, and better leveraging their collaboration tools such as Microsoft SharePoint – all to get results in less time due to fewer meetings and less conflict.

### Leaders

Leading through complexity and change while managing oneself can challenge even the best leaders. Through 1:1 coaching and highly tailored approaches to maximize leadership effectiveness, we support leaders in clarifying and aligning their priorities and their teams' priorities with the big picture. We also coach executives on decision making, communication and getting the most from themselves and those they lead.

### Organizations

As advocates for the leaders, the culture and everyone who works for the organization, we take a big picture approach and architect best-in-class, highly-customized solutions that support shaping a winning culture that gets the right things done at the right time in the right way.

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