



BREAKTHROUGH SCHEDULING™

Fundamental Practice #4



the
break|through
coach

Creating Accomplished, Energized, Inspired School Leaders

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Background Philosophy

The Breakthrough Coach (TBC) Program is designed to produce breakthroughs in a school administrator and school secretary's time, results and satisfaction by allowing this leadership duo to:

- Work fewer hours, with less effort and less difficulty
- Increase performance results in their schools and departments
- Expand their personal fulfillment

TBC believes it is the educational secretary who makes the biggest difference to the transformation of a school or department by creating the time and space for the school executive to focus on instructional leadership. To accomplish this, a secretary must first make their executive's time more valuable by making it more scarce. Implementing TBC's Breakthrough Scheduling Methodology allows this to happen quickly and easily.

The following pages present TBC's insights into the discipline of Breakthrough Scheduling™. Please use them to produce breakthroughs in your own time, results and satisfaction.

Thank you in advance for your partnership,
Jill Pancoast – President
The Breakthrough Coach

Goals of Breakthrough Scheduling™

- Executive completes 2-3 Coaching Days per week
- Executive is scheduled 6-8 weeks in advance
- No empty space on the executive's calendar
- Executive's time is focused on high impact work
- Secretary anticipates potential scheduling breakdowns and resolutions

As the secretary masters Breakthrough Scheduling™, (and the executive practices doing what they're told), the executive gets to coach more than ever before! However, when the executive insists on managing their own calendar, Coaching Days never happen. This is why secretaries are so important to the process.

Scheduling **Infrastructure**

Most scheduling methodologies don't deliver breakthrough results because they lack:

- Awareness of a typical day's activities and workflow
- An accurate presentation of how people really view their time
- A thoughtful process to handle anomalies

We define **Infrastructure** as the daily reoccurring activities around which all new action is accommodated, scheduled and recorded. Begin the Breakthrough Scheduling™ process by planning for your executive's **Infrastructure** first. **Infrastructure** categories include:

- Arrival Procedure Time
- Go Home Time
- Lunch Time
- Daily Secretary Meeting
- Standard Weekly Meetings
- Office, Coaching and Rest Days
- Coaching Time on Coaching Days
- Office Time on both Office Days and Coaching Days
- Personal Activity Time

Step 1: Schedule **Arrival Procedure Time**

What do you need to know about your executive? Start with the simple facts:

- What time does your executive get to work? ____ AM
- What time does your executive really start working? ____ AM

This period is called *Arrival Procedure Time*:

- Identify the time your executive gets to work in the morning
- Add time needed to hang up coat, secure a cup of coffee and “land”
- Estimated time “in and ready” - 15 minutes

Begin by scheduling your executive’s *Arrival Procedure Time*:

- As a repeating event
- 6 to 8 weeks out
- Monday – Friday
- In an early 15-minute AM time slot. **EXAMPLE:** 7:30 – 7:45 AM

Then examine the reality of each week. If every Tuesday the executive arrives at 7:45 AM, but the rest of the week at 7:30 AM, plot this as it actually happens.

- Schedule Tuesday’s *Arrival Procedure* from 7:45 – 8:00 AM
- And the rest of the week from 7:30 – 7:45 AM

Making this slight alteration is key.

By editing this single occurrence of a repeating event, it demonstrates the overall accuracy of the executive’s calendar, rather than simply presenting the calendar as a theoretical idea.

Step 1 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure	Arrival Procedure	
	45am		Arrival Procedure				
08	00am						
	15am						
	30am						
	45am						
09	00am						
	15am						
	30am						
	45am						
10	00am						
	15am						
	30am						
	45am						
11	00am						
	15am						
	30am						
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	15pm						
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	30pm						
	45pm						
04	00pm						
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	30pm						
	45pm						
05	00pm						
	15pm						
	30pm						
	45pm						

Step 2: Schedule **Go Home Time**

Most executives leave the office whenever they tire of what they've been doing and decide to leave.

Scheduling a specific time for your executive to leave every day significantly improves their chances of leaving on-time, including days when they need to depart early for special events. Again, approach each day specifically and accurately by considering:

- Your executive's goal for total hours per week at work AND
- The time your executive actually needs to leave the office to achieve that goal

Then plug *Go Home Time* into their calendar:

- As a repeating event
- 6 to 8 weeks out
- Monday – Friday
- In an afternoon time slot. **EXAMPLE:** 4:30 – 5:00 PM

Step 2 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure	Arrival Procedure	
	45am		Arrival Procedure				
08	00am						
	15am						
	30am						
	45am						
09	00am						
	15am						
	30am						
	45am						
10	00am						
	15am						
	30am						
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11	00am						
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	30am						
	45am						
12	00pm						
	15pm						
	30pm						
	45pm						
01	00pm						
	15pm						
	30pm						
	45pm						
02	00pm						
	15pm						
	30pm						
	45pm						
03	00pm						
	15pm						
	30pm						
	45pm						
04	00pm						
	15pm						
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home	
	45pm						
05	00pm						
	15pm						
	30pm						
	45pm						

Step 3: Schedule **Lunch Time**

To ensure a balanced, healthy work situation, **Lunch Time** needs to be scheduled for both you and your executive as a regular part of the daily routine.

Schedule a minimum, 30-minute, mid-day lunch break.

- As a repeating event
- 6 to 8 weeks out
- Monday – Friday
- In a 30-minute mid-day time slot.
- **EXAMPLE:** 12:00 – 12:30 PM

Then examine the reality of each week and make *Lunch Time* alterations where necessary to accommodate meetings, etc., but **never omit *Lunch Time***.

This is a habit worth building – maintaining the accuracy of the calendar *and* supporting the executive team’s physical well-being. Then sit back and watch your organization thrive!

Step 3 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure	Arrival Procedure	
	45am		Arrival Procedure				
08	00am						
	15am						
	30am						
	45am						
09	00am						
	15am						
	30am						
	45am						
10	00am						
	15am						
	30am						
	45am						
11	00am						
	15am						
	30am						
	45am						
12	00pm	Lunch	Lunch	Lunch	Lunch	Lunch	
	15pm						
	30pm						
	45pm						
01	00pm						
	15pm						
	30pm						
	45pm						
02	00pm						
	15pm						
	30pm						
	45pm						
03	00pm						
	15pm						
	30pm						
	45pm						
04	00pm						
	15pm						
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home	
	45pm						
05	00pm						
	15pm						
	30pm						
	45pm						

Step 4: Schedule the **Daily Secretary Meeting**

The Daily Secretary Meeting happens on both *Office Days* and *Coaching Days*. When regularly scheduled, the odds of having the *Daily Secretary Meeting* increase. An added benefit: the more frequently you meet with your executive, the less time you will need to schedule per meeting.

When is the best time for the Daily Secretary Meeting?

Whenever **you say** it's the best time... it's your meeting.

Ask yourself, based on your schedule and your executive's commitments:

- When is the best time for my meeting?
- How long do I need to meet?

Then plug the Daily Secretary Meeting into the schedule as a repeating event:

- 6 to 8 weeks out
- Monday–Friday
- **EXAMPLE:** 7:45 – 8:15 AM

To you ensure you both meet at the same time everyday:

- Gather all papers and materials needed for your daily meeting
- Walk into the executive's office
- Join any meeting currently in progress
- Inform all visitors this time is now reserved for another meeting
- Wait until the current meeting concludes (your presence will significantly speed this up)
- And create the expectation that your meeting will be kept, no matter what

Step 4 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure	Arrival Procedure	
	45am	Secretary Mtg.	Arrival Procedure	Secretary Mtg.	Secretary Mtg.	Secretary Mtg.	
08	00am		Secretary Mtg.				
	15am						
	30am						
	45am						
09	00am						
	15am						
	30am						
	45am						
10	00am						
	15am						
	30am						
	45am						
11	00am						
	15am						
	30am						
	45am						
12	00pm	Lunch	Lunch	Lunch	Lunch	Lunch	
	15pm						
	30pm						
	45pm						
01	00pm						
	15pm						
	30pm						
	45pm						
02	00pm						
	15pm						
	30pm						
	45pm						
03	00pm						
	15pm						
	30pm						
	45pm						
04	00pm						
	15pm						
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home	
	45pm						
05	00pm						
	15pm						
	30pm						
	45pm						

Step 5: Schedule **Standard Weekly Meetings**

Chances are you already have most of these meetings scheduled on your executive's calendar, but if you are missing any, add them in now.

Consider:

- Which ones are currently missing?
- How much time is needed for each?
- Which days are best for them to occur?
- Does travel time need to be included? If so, how much?
- Is prep time needed? If so, how much?

After answering these questions, plug your executive's **Standard Weekly Meetings** into the schedule 6-8 weeks out.

Where possible, cluster **Standard Weekly Meetings** close together in time to make these days more efficient. Begin a dialogue with Central Office about their current schedule of meetings and explain how their schedule either supports or thwarts your intended plan. (Consider requesting a **District-Wide Coaching Day.**)

Step 5 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure	Arrival Procedure	
	45am	Secretary Mtg.	Arrival Procedure	Secretary Mtg.	Secretary Mtg.	Secretary Mtg.	
08	00am		Secretary Mtg.				
	15am						
	30am						
	45am						
09	00am						
	15am						
	30am	AP Mtg.					
	45am						
10	00am						
	15am						
	30am						
	45am						
11	00am						
	15am						
	30am						
	45am						
12	00pm	Lunch	Lunch	Lunch	Lunch	Lunch	
	15pm						
	30pm						
	45pm						
01	00pm						
	15pm						
	30pm						
	45pm						
02	00pm						
	15pm						
	30pm				Travel Time		
	45pm						
03	00pm						
	15pm				DO Mtg.		
	30pm						
	45pm						
04	00pm						
	15pm				Travel Time		
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home	
	45pm						
05	00pm						
	15pm						
	30pm						
	45pm						

Step 6: Schedule **Coaching, Office & Rest Days**

Your executive's week will be allocated into three types of days:

1. Coaching Days

- Full days dedicated to coaching staff out in their environment
- **Goal: 2 Coaching Days per week**

2. Office Days

- Full days spent in the office planning, completing paperwork, making phone calls, holding/attending meetings, etc.
- **Goal: 3 Office Days per week**

3. Rest Days

- 24 hour periods dedicated to rest, rejuvenation and relaxation
- Allows the brain and body a chance to relax; connect with self, family and friends
- No business done on these days – absolutely none
- **Goal: 2 Rest Days per week**

Look out 6-8 weeks from today and determine which days will be your executive's *Coaching, Office* and *Rest Days* going forward. Why schedule so far ahead? Because if you look at your executive's calendar over the next 6 weeks, you probably won't see any wide-open days. The time has already been filled.

Also, scheduling these days well in advance removes the "tyranny of the urgent." If your executive's *Coaching* and *Office Days* are only scheduled 2-3 weeks out, then you have no wiggle room to adjust the days should any changes arise - and changes always arise.

Schedule *Coaching, Office* and *Rest Days* as headings at the beginning of each day so that they appear at the top of the calendar on the assigned day. This allows the secretary to quickly and easily identify the days when adding items to the executive's calendar. Then, during Friday's *Daily Meeting*, take time to update your executive's calendar one week beyond the eight week perimeter. This maintains a consistent plan of action for you and your executive.

Step 6 Calendar

		MON	TUE	WED	THU	FRI	SAT	SUN
		Office	Coaching	Office	Office	Coaching	Rest	Rest
07	00am							
	15am							
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure	Arrival Procedure		
	45am	Secretary Mtg.	Arrival Procedure	Secretary Mtg.	Secretary Mtg.	Secretary Mtg.		
08	00am		Secretary Mtg.					
	15am							
	30am							
	45am							
09	00am							
	15am							
	30am	AP Mtg.						
	45am							
10	00am							
	15am							
	30am							
	45am							
11	00am							
	15am							
	30am							
	45am							
12	00pm	Lunch	Lunch	Lunch	Lunch	Lunch		
	15pm							
	30pm							
	45pm							
01	00pm							
	15pm							
	30pm							
	45pm							
02	00pm							
	15pm							
	30pm				Travel Time			
	45pm							
03	00pm							
	15pm							
	30pm				DO Mtg.			
	45pm							
04	00pm							
	15pm				Travel Time			
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home		
	45pm							
05	00pm							
	15pm							
	30pm							
	45pm							

Step 7: Schedule **Coaching Time on Coaching Days**

Once you have scheduled your executive's *Coaching Days*:

- Drop down into each *Coaching Day*
- Reserve all empty space as **Coaching**
- Large blocks of time should now appear as **Coaching**

This is the purpose of TBC's Scheduling Methodology™. Your executive now has time set aside to:

- Wander the halls
- Observe instruction "while the game is being played"
- Coach staff
- Evaluate teachers when appropriate

EXAMPLE: On your executive's next *Coaching Day*:

- Schedule **Coaching** between 8:30 AM – 12 noon
- Schedule **Lunch** between 12 – 12:30 PM
- Continue next block of **Coaching** between 12:30 – 3:00 PM

WARNING:

Your executive cannot be in two places at once. You never want to schedule two events side-by-side on the calendar, even if they are happening at the same time.

EXAMPLE: The **Science Fair** appears on the calendar because you want your executive aware that it's taking place, but not necessarily because he or she will be attending. Therefore, **Science Fair** is added as a heading at the top of the calendar day, directly under **Coaching Day**.

Step 7 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
	Office	Coaching	Office	Office	Coaching	Rest	Rest
		Science Fair 9-12pm			Blood Drive 12:30-2:30pm		
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure	Arrival Procedure	
	45am	Secretary Mtg.	Arrival Procedure	Secretary Mtg.	Secretary Mtg.	Secretary Mtg.	
08	00am						
	15am		Secretary Mtg.				
	30am		Coaching		Coaching		
	45am						
09	00am						
	15am						
	30am	AP Mtg.					
	45am						
10	00am						
	15am						
	30am						
	45am						
11	00am						
	15am						
	30am						
	45am						
12	00pm	Lunch	Lunch	Lunch	Lunch	Lunch	
	15pm						
	30pm		Coaching		Coaching		
	45pm						
01	00pm						
	15pm						
	30pm						
	45pm						
02	00pm						
	15pm						
	30pm				Travel Time		
	45pm						
03	00pm						
	15pm				DO Mtg.		
	30pm						
	45pm						
04	00pm						
	15pm				Travel Time		
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home	
	45pm						
05	00pm						
	15pm						
	30pm						
	45pm						

Step 8: Schedule **Office Time** on Office Days

Working in the same time period as in Step 7:

- Drop down into each *Office Day*
- Reserve all empty space as **Office Time**
- **Large blocks of time should now appear as Office**

Office Time is literally a placeholder - it's code for "time being held."

Into these placeholders you can then schedule your executive to complete specific office work, conduct meetings, make phone calls, etc.

TIP: It is possible for your executive to do some office work every day, including on *Coaching Days*. On *Coaching Days*, when possible, schedule **Office Time** placeholders after **Coaching**.

Step 8 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
	Office	Coaching	Office	Office	Coaching	Rest	Rest
		Science Fair 9-12pm			Blood Drive 12:30-2:30pm		
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure	Arrival Procedure	
	45am	Secretary Mtg.	Arrival Procedure	Secretary Mtg.	Secretary Mtg.	Secretary Mtg.	
08	00am		Secretary Mtg.				
	15am						
	30am	Office Time	Coaching	Office Time	Office Time	Coaching	
	45am						
09	00am						
	15am						
	30am	AP Mtg.					
	45am						
10	00am						
	15am						
	30am	Office Time					
	45am						
11	00am						
	15am						
	30am						
	45am						
12	00pm	Lunch	Lunch	Lunch	Lunch	Lunch	
	15pm						
	30pm	Office Time	Coaching	Office Time	Office Time	Coaching	
	45pm						
01	00pm						
	15pm						
	30pm						
	45pm						
02	00pm						
	15pm						
	30pm				Travel Time		
	45pm						
03	00pm		Office Time		Office Time		
	15pm				DO Mtg.		
	30pm						
	45pm						
04	00pm						
	15pm				Travel Time		
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home	
	45pm						
05	00pm						
	15pm						
	30pm						
	45pm						

Step 9: Schedule **Office Time Activities on Office Days**

A proficient secretary makes it their business to understand their executive's over-arching goals, both personal and professional. These goals become the secretary's "North Star" for scheduling.

The executive's job is to keep their secretary up to speed about their goals by regularly "brain-dumping" any related projects, tasks, to-do's, promises, agreements, and arrangements during *Daily Meeting*. The secretary listens discerningly, then schedules their executive's next steps in actual time frames.

As you identify phone calls, meetings and projects that require your executive's attention:

- Plug the actual name of the activity into a specific time slot during the **Office Time** placeholders.
- The activity is now a time-bound task to be done and the **Office Time** placeholder shrinks.

When you get to an actual *Office Day* on the calendar, these Office Time placeholders disappear entirely, replaced by scheduled "to do" items for your executive to work on. This causes rapid movement in the direction of a breakthrough for you and your executive. Your executive's precious time is now being honored.

Step 9 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
	Office	Coaching	Office	Office	Coaching	Rest	Rest
		Science Fair 9-12pm			Blood Drive 12:30-2:30pm		
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure		
	45am	Secretary Mtg.	Arrival Procedure	Secretary Mtg.	Secretary Mtg.		
08	00am		Secretary Mtg.				
	15am						
	30am	Office Time	Coaching	Write ABC	Drop-Ins	Coaching	
	45am	Call w/Steve					
09	00am	Call w/Supt.		Sign Diplomas			
	15am	Mtg. Preparation					
	30am	AP Mtg.		Review Data	Finish ABC		
	45am						
10	00am		Call w/Jane				
	15am		Call w/Joe				
	30am	Signature File		Call w/Smith	Call w/Lynn		
	45am	Call w/Mary		Call w/Ellie	Call w/Fran		
11	00am	Call w/Jane		Call w/Mike	Call w/Mary		
	15am	Mtg. w/John		Call w/Sandy	Call w/Sue		
	30am			Call w/Jim	Call w/Ann		
	45am			Check Email	Check Email		
12	00pm	Lunch	Lunch	Lunch	Lunch		
	15pm						
	30pm	Write ABC	Coaching	Mtg. Preparation	Mtg. w/Dan	Coaching	
	45pm			Mtg. w/Chair	Mtg. w/Rich		
01	00pm				Mtg. w/Lou		
	15pm				Review LMN		
	30pm	Review LMN					
	45pm				Office Time		
02	00pm	Call w/Jason					
	15pm	Call w/George		Call w/Sam			
	30pm	Office Time		Call w/Ben	Travel Time		
	45pm			Review Data			
03	00pm				Office Time		
	15pm			Office Time	DO Mtg.		
	30pm						
	45pm	Review Email					
04	00pm	Office Time					
	15pm				Travel Time		
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home	
	45pm						
05	00pm						
	15pm						
	30pm						
	45pm						

Step 10: Schedule **Personal Activity Time**

Lastly, schedule your executive's **Personal Activity Time** on the calendar as well. *Personal Activity Time* are those specific activities your executive has agreed to use for rest, rejuvenation and relaxation. It is important to schedule them rather than leaving them to chance.

Your executive may or may not have specific activities to schedule now. If none are currently on the calendar, you will need to use *Personal Activity Time* as a placeholder until specific activities are determined. **Personal Activities could include:**

- **Workouts**
- **Doctor's appointments**
- **Date/family nights**
- **Meditation**

Create a *Personal Activities* list with your executive for use throughout the year. Remember to schedule these activities 6-8 weeks out.

Step 10 Calendar

	MON	TUE	WED	THU	FRI	SAT	SUN
	Office	Coaching	Office	Office	Coaching	Rest	Rest
		Science Fair 9-12pm			Blood Drive 12:30-2:30pm		
07	00am						
	15am						
	30am	Arrival Procedure		Arrival Procedure	Arrival Procedure		
	45am	Secretary Mtg.	Arrival Procedure	Secretary Mtg.	Secretary Mtg.		
08	00am		Secretary Mtg.				
	15am						
	30am	Office Time	Coaching	Write ABC	Drop-Ins	Coaching	
	45am	Call w/Steve					
09	00am	Call w/Supt.		Sign Diplomas			
	15am	Mtg. Preparation					
	30am	AP Mtg.		Review Data	Finish ABC		
	45am						
10	00am		Call w/Jane				
	15am		Call w/Joe				
	30am	Signature File		Call w/Smith	Call w/Lynn		
	45am	Call w/Mary		Call w/Ellie	Call w/Fran		
11	00am	Call w/Jane		Call w/Mike	Call w/Mary		
	15am	Mtg. w/John		Call w/Sandy	Call w/Sue		
	30am			Call w/Jim	Call w/Ann		
	45am			Check Email	Check Email		
12	00pm	Lunch	Lunch	Lunch	Lunch		
	15pm						
	30pm	Write ABC	Coaching	Mtg. Preparation	Mtg. w/Dan	Coaching	
	45pm			Mtg. w/Chair	Mtg. w/Rich		
01	00pm				Mtg. w/Lou		
	15pm				Review LMN		
	30pm	Review LMN					
	45pm				Office Time		
02	00pm	Call w/Jason					
	15pm	Call w/George		Call w/Sam			
	30pm	Office Time		Call w/Ben	Travel Time		
	45pm			Review Data			
03	00pm				Office Time		
	15pm			Office Time	DO Mtg.		
	30pm						
	45pm	Review Email					
04	00pm	Office Time					
	15pm				Travel Time		
	30pm	Go Home	Go Home	Go Home	Go Home	Go Home	
	45pm						
05	00pm		Workout	Dentist Appointment	Workout	Date Night	
	15pm						
	30pm						
	45pm						

In Conclusion – Keys to Success

1. Stay in front of your executive's schedule by at least six weeks.
2. Make time at least once a week in your *Daily Meeting* to work together on your executive's calendar.
3. Never allow your executive open *Office Time* on the calendar without specific actions to accomplish.
4. If you begin to run out of things for your executive to do, either look ahead to your executive's yearly reoccurring work (example: master planning) or switch *Office Time* to *Coaching*. You may even want to add another *Coaching Day*.
5. Eliminate duplication and/or side-by-side activities. Your executive can not be in two places at once.
6. Eliminate surprises. Hand your executive a paper copy of the next day's schedule before leaving. If they "get a visual" showing what's already been planned, they will be better prepared.
7. Post your executive's calendar at your desk for all to see. When people come looking for your executive, point to the calendar. Let people know when the executive's next *Coaching Day* is scheduled. This way, you are not the "Bad Cop" but more correctly, the "Keeper of the Calendar."
8. There will be breakdowns! There will be days when your executive is scheduled to be in classrooms and an emergency parent meeting is needed, or Central Office calls, or your executive gets sick. When this happens, don't panic. As you and your executive continue to work together, it will become clearer which breakdowns need to be dealt with in the moment and how to manage them. However, your focus never changes. As the secretary, you keep your executive's calendar. Do what needs to be done for your executive to be successful.



the
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Creating Accomplished, Energized, Inspired School Leaders

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