



MONTHLY REVIEW + PLANNING

August - September 2023

MONTHLY REVIEW + PLANNING

As leaders, it's easy to get swept up in the chaos of our daily grind, running from one fire to the next and never stopping to take the time to create a strategic plan for the month ahead. If we do get a moment or two to map things out, we usually struggle to celebrate all that we've accomplished and everything our teams have done. Celebrating our wins, though, is a key part of helping us grow and develop as leaders. Marking our milestones and accomplishments helps us continue to refine and stretch our goals and ultimately leave a bigger impact.

Our 10% Secret planning system accounts for 2 hours each month for this intentional review. Though it may seem impossible to carve out that much time each month, you'll find these intentional moments invested at the close of each month allow you to take back your time and regain your sense of control.

Increase your effectiveness by setting goals within each of the Four Focuses of a Leader: instilling personal **resilience**, increasing employee **engagement**, improving the patient **experience**, and inspiring operational **innovation**.

Here are some helpful tips for doing your first monthly review:

<i>Celebration</i>	Wrap up each month with a look back at everything you've accomplished over the past thirty days—individually and as a team—and which of the Four Focuses of a Leader each item addresses. Have you been working toward completing a major initiative or goal? Have you finally hit a major milestone or KPI that you've been chasing? Note your progress and reflect on the skills you've developed and the person you've become in pursuit of this goal.
<i>Anticipation</i>	Make a quick list of everything that needs tackled in the month ahead. Which projects will help you advance key organizational initiatives and address the Four Focuses of a Leader (personal/team resilience, employee engagement, patient/customer experience, and operational innovation) and which projects are necessary for improving your department or fulfilling the duties of your role? Note key deadlines and who will be the owner of each project so you can plan accordingly.
<i>Vision</i>	Get creative with space to brainstorm, scribble your to-do list, set aspirational goals, draw a mind map, or outline key projects for the month. Then, refine your planning and note how you'll make a contribution in each of the Four Focuses of a Leader. Prepare in advance for any challenges that may come and make a gameplan now for how you'll overcome any potential obstacles.
<i>Decision</i>	Make your plans concrete by mapping out your key priorities for each week. Ensure you're growing in the Four Focuses of a Leader and plan ahead for all work, vacations, events, and priorities. Look back at your annual and quarterly plans and carry forward any tasks or initiatives that still need addressed. With your projects mapped for each week, schedule any meetings or check-ins that will be necessary to help you stay on track.

THIS MONTH'S ACCOMPLISHMENTS

ACCOMPLISHMENTS		FOCUS
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		

BURNING IDEAS (What do you need to defer, delegate, delete, or do to clear it off your list?)

PLANS FOR NEXT MONTH

FOUR FOCUS PROJECTS

	PROJECT	WHO'S RESPONSIBLE	DUE
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

OTHER DEADLINES

	PROJECT	WHO'S RESPONSIBLE	DUE
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

SEPTEMBER 2023

SEPTEMBER 2023						
S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

OCTOBER 2023						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

NOVEMBER 2023						
S	M	T	W	T	F	S
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

DECEMBER 2023						
S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

SUNDAY	MONDAY	TUESDAY
3	4	5
10	11	12
17	18	19
24	25	26

SEPTEMBER 2023

WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1	2
6	7	8	9
13	14	15	16
20	21	22	23
27	28	29	30

MONTHLY PLANNING

Taking back our time with the 10% Secret budgets two hours per month to strategically work through our goals and help us make time for the work of a leader. Use the space below to brainstorm freely, draw a mind map, or scribble a checklist to capture any plans and goals you have for month. What's most important to you? What are the obstacles you may face? How will you plan to overcome those challenges? Use the monthly planning worksheet on the right to record your specific projects and action steps.

<i>Resilience</i>	
<i>Engagement</i>	
<i>Experience</i>	
<i>Innovation</i>	

SEPTEMBER 2023

FOUR FOCUSES	
1	Personal + Team Resilience
2	Employee Engagement
3	Patient + Customer Experience
4	Innovating Operations
5	Other:

MONTHLY 10% TASKS	
	Review Quarterly Plan
	List Four Focus Monthly Projects
	List Operational Projects
	Determine Week for Each Project
	Schedule Work Time for Projects

MONTHLY PROJECTS	
Resilience	
1	
2	
3	
4	
Engagement	
1	
2	
3	
4	
Experience	
1	
2	
3	
4	
Innovation	
1	
2	
3	
4	
Other:	
1	
2	
3	
4	

WEEKLY PRIORITIES	
Week 1	
Week 2	
Week 3	
Week 4	
Week 5	

A bend in the road is not the end of the road...unless you fail to make the turn.
Helen Keller

JOIN OUR FREE WEBINAR SERIES!

The new healthcare environment has brought attention to the need for strategists, marketers, and communication leaders (SMC) to leverage their broad understanding of the system, their human-centric perspective, and their skills as futurists, system-thinkers, and change agents to help tackle the most pressing strategic challenges of the organization:

- » Strengthening **recruitment** strategies
- » Improving **retention** by building employee engagement
- » Driving results through **leadership** activation and
- » Improving operations and finances through **innovation**

Smart SMC leaders are refocusing their efforts and building their 2024 plans to include leading the organization forward in these four key culture areas: Recruitment, Retention, Leadership, and Innovation.

Increasing your acumen and strategic value to drive these high-impact, mission critical objectives will make you an indispensable resource to your CEO and the go-to expert for improving your organization.

Join our free, 5-part webinar series to build your 2024 plan and create your strategy for each key initiative:

Planning	CREATING YOUR 2024 PLAN NOVEMBER 9, 2023 Using our 10% Secret Leadership Planner, we'll set personal + professional goals for 2024, map out a strategy for implementing key initiatives, and make a plan to improve brand awareness, enhance employee and customer engagement, improve your organizational reputation, and drive strategic growth.
Recruitment	RECRUITING FOR GROWTH FEBRUARY 8, 2024 Learn how leveraging an employer brand mindset will help marketers + HR leaders team up to improve recruitment, attract ideal cultural fits to your organization, and create a strong and healthy organizational culture that top talent is eager to join.
Retention	SEVEN STAGES OF EMPLOYEE ENGAGEMENT MAY 9, 2024 Embrace an employee-centric mindset and map out key initiatives for each step of the employee journey with the Seven Stages of Employee Engagement to ensure top talent continues to thrive at your organization and find purpose and fulfillment in their role.
Leadership	FOUR FOCUSES OF A LEADER AUGUST 8, 2024 Align your focus and maximize your team's impact with a simplified leadership model built around the Four Focuses of a Leader. Rally your team around common goals and gain more traction with all employees focused on building engagement, improving patient experience, and innovating operations.
Innovation	BUILDING A CULTURE OF INNOVATION NOVEMBER 14, 2024 Take the lead to build a culture of continuous improvement with a deep understanding of how to launch an innovation initiative at your health system, empower all employees to bring their most creative ideas to fruition, and implement process refinements to improve quality, outcomes, access, and customer service.

Register for the series at leveltenadvisors.com/events/elevate-your-role



We help healthcare executives advance
organizational transformation through strategic
advisory consulting.

leveltenadvisors.com