



AUM Launchpad
A Truist Fan Company

Challenge 7 of 21: Standup Meeting and Scrum Framework

Hey, hey...Rob Brown of Truist Fan here.

Welcome back to the 21-day Time Mastery Challenge where I'm helping you get 5 to 10 hours, at a minimum, back in your week because I want you to massively improve your personal productivity and, deep down, I want you to make your business, your practice, the best that it can be.

This is day 7 and today is the first day where I'm going to ask you to specifically get your team involved, whether that team is just an assistant that you share with somebody else or it's a big team that you're working with and you all work together on a on a day to day basis.

So, today we'll talk a little bit about teamwork.

But, before we jump into teamwork, I want to make sure you're on track, you're tracking with what we've been doing so far.

First, I've helped you create some space to save some time because you've unsubscribed from emails, you've built an email system, you're on a social media diet, you have a system for returning calls and emails each day.

You're also beginning to feel a little bit better about your day because you're starting with a morning routine and that morning routine includes the fact that you have a mental picture of your future success.

You know where your business is headed and you're feeling better about it.

Today, as I said, this is really building on those daily building blocks. What are those things that you need to do every day to make sure your business moves forward? And I want you to get your team involved, you can't do this alone. Unless you work by yourself, you need to get those people who support your business involved with what you're doing.

The first thing that I would encourage you to do is just spend a few minutes, set up a meeting with your team or with your assistant, and just talk about the 21-day challenge. Talk about how you've taken a leap to change some of the things that you're doing...to eliminate some bad habits, to get more serious about being more productive.

Encourage them to follow along.

I absolutely want you to share this challenge with your team, don't feel like you must do it alone. If they see that you're doing it, if they see that you're serious about what you're doing, they're going to help you more and more because they're going to think, "Hey, if Rob is willing to make changes to his business. If he's willing to change the way he's been doing things for months or years or longer, then maybe I should be willing to think about that too."

A great way to get them involved is by holding what I call a daily stand-up meeting.

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Sometimes these meetings are called a daily pow wow or a daily scrum. The bottom line is, it's a very short meeting, 15 minutes or less, that you hold with your team, even if it's just one person that you share with other advisors. You stand up and talk about what's going on in your business once a day for about 15 minutes.

I wouldn't make this the first thing that you do when you get into the office each day. I would either do it right before lunch or right after lunch. Hold a meeting that involves what's going on in the flow of the activities that have developed as your day has gotten started. And the agenda for the meeting is very simple, it's not complicated, it's not getting down into the minutia, it's not getting buried in the weeds.

The agenda goes through three key discussion points.

The three topics, the three items on your agenda for your daily stand-up meeting, for your daily pow wow should be. Number one, what were your main accomplishments yesterday? Not every little thing that you did. Each person on the team has an opportunity to talk about the big things that they got done the day before. Some days, maybe, there isn't a lot to talk about but that's okay, at least you have a chance to talk about what you have gotten done.

The second thing you want to talk about is what are the big goals for the current day, what are the main things that you're trying to do today. Maybe you have some client meetings coming up and you need to get prepared for those or you have some clients coming into the office, you want to make sure everybody is on their toes to greet those clients appropriately. After you've talked about your main accomplishments from the previous day, talk about your biggest goals for the current day. Again, each member of your team, whether it's two of you or five of you, take just a few minutes to talk about each one of these topics.

And finally, item number three is saying "here's where I need help" ...here's where I could use the help from other members of the team. "We have these folks coming into the office today, I have 90% of it wrapped up but I need help with this..." Often times, other members of the team will already be thinking about those things in advance and know how they could help you accomplish your goals.

When you have that daily stand-up meeting, that pow wow, that scrum, and you talk about what was big yesterday, what's big today, and where you need help, you'll improve the efficiency of your team.

You'll work better together as a team than.

Better than you would if you sat down and had long meetings where you got into all the minutia and the details. Those meetings may still be important, you still may need to have them, but the daily stand-up meeting is a must.

There have been countless studies done on this topic and the people who have done the studies have found that teams that do daily stand-up meetings increase their productivity by 20% and 30%...just by this one, simple activity. You stand up around somebody's desk for 15 minutes and talk about these three main points.

Today, what I want you to do is I want you to implement a daily stand-up meeting.

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As you begin to share with your team what you've been doing throughout the 21-day challenge, share with them how they can help...how they can actually join the challenge specifically by being involved in a daily stand-up meeting.

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