


ORGANIZE AND EXECUTE AROUND YOUR PRIORITIES


PERSONAL MANAGEMENT MATRIX: Activities

The first matrix segments daily activities into the four quadrants to help you determine where they fall within the management matrix.

		URGENT	NOT URGENT
IMPORTANT		ACTIVITIES: Crises Deadline-driven Problem-minded Immediate attention <i>Can't ignore – constant pressure</i> 1	ACTIVITIES: Exercise Prevention Planning Relationship building <i>Proactive and results-minded</i> 2 
	NOT IMPORTANT	3 ACTIVITIES: Interruptions Some calls, reports Some meetings Popular activities <i>Priorities and expectations of others</i>	4 ACTIVITIES: Trivia Busy Work Time wasters Pleasant activities <i>Pleasure of escape</i>

PERSONAL MANAGEMENT MATRIX: Results

The second matrix segments the results from the above activities in the four quadrants. This helps you decide on which activities to engage in and the best choices to make for optimal outcome.

		URGENT	NOT URGENT
IMPORTANT		RESULTS: Stress / Burnout Crisis Management Always putting out fires Knocked down Overschedule yourself 1	RESULTS: Vision Balance Discipline Control Few crises 2 
	NOT IMPORTANT	3 RESULTS: Short-term focus Crisis Management Feel victimized, out of control Fulfilling others expectations	4 RESULTS: Total irresponsibility Fired from jobs Dependent on others Escape from Quadrant 1

* Source: STEPHEN COVEY – 7 HABITS OF HIGHLY EFFECTIVE PEOPLE

IRONSTONE’S BACKGROUND

Ironstone partners with financial industry professionals including leadership and sales management teams, internal and external wholesalers, and top advisors along with their teams who want to build a customized practice. We pride ourselves on the unique customizations that we apply to each engagement in order to meet the overall client objectives. Our resources include:

- Keynote Presentations
- Workshops
- Study Groups
- Performance Coaching
- Webinars
- Project Consulting

Our programs are not only customized for any audience, but also interactive, high-energy, and built with “how-to” strategies resulting in real-world implementation for significant and sustainable impact. We are actively recruited to participate in professional events such as national, divisional, regional conferences, breakout, and lunch-n-learn sessions.

IRONSTONE’S FUNDAMENTAL 4™

Ironstone has identified 4 key performance areas known as the **Fundamental 4™**, which are required to design, develop, and sustain a successful business. Our expertise aligned with our strategic and tactical methodology creates laser focus around the **Fundamental 4™** to impact the bottom-line while bringing maximum client value:

- Strategic Planning
- Business Development
- Operational Effectiveness
- The Human Element



FUNDAMENTAL 4 – HUMAN ELEMENT

The purpose of this component is the development of individual and team efficiency and effectiveness for the benefit of the business. The evolution of this fundamental revolves around organizational skills, management of teams, refined roles and responsibilities, and accountability for performance. This opens the lines of communication throughout a team to create a positive culture. “Everyone on the same page” is very simple to understand but in reality, there are many directions and agendas driven by egos, greed, and lack of leadership.

KEY PERFORMANCE INDICATOR	PROGRAM OBJECTIVES
Leadership	Leaders don’t merely take charge. They make the tough decisions while motivating and empowering others to succeed.
Culture	Foster a healthy pattern of interactions among team members by encouraging openness, honesty, respect, and assertiveness in day-to-day dealings and when handling problems.
Organizational Skills	Effective management of the details lies in the art of being able to see how everything works together to complete a project. Hone these skills to create a razor sharp team.
Job Descriptions	Summarize the roles and responsibilities of all the team members needed to reach the desired goal or outcome of the practice.
Hiring and Onboarding	Outline the process through which new employees acquire the necessary knowledge, skills and, behaviors to become effective organizational members and insiders. The ProfileXT assessment helps you find the best matched candidates to specific roles.
Communication	Knowledge is power, but fruitless if poorly communicated. The Myers-Briggs Personality assessment helps you understand and convey meaningful information and express ideas effectively to attain a deeper level of communication.
Performance Evaluation	When did you last conduct a performance review? Define a method to evaluate, develop, and maintain performance in terms of quality, quantity, cost, and time.
Team Development	Enhance the effectiveness of work groups by refining roles, expectations, and interpersonal communication to create accountability for results.

*Any of the above KPI’s can be combined to form the basis of a workshop, performance coaching, or project consulting partnership.