

All Worksheets for
Dennis Kennedy's
Productive Personal Quarterly Offsites
for Busy Legal Professionals Course



Willing to spend just a half day to focus on your most important but not urgent priorities? My online Productive Personal Quarterly Offsites for Busy Legal Professionals course gives you an executable plan. Learn more and purchase the course at <https://bit.ly/3ubxT3x>

LESSON 1 WORKSHEET

Brainstorming Your Personal Quarterly Offsite

When? (Last Saturday of Quarter?)

Where? (Up to three ideas)

Potential Themes or Big Questions?

Benefits? (What results would you like to have?)

Possible Formats? (Idea capture; deep think; structured exercises; etc.)

LESSON 2 WORKSHEET

Standard agenda template

Date & Time	
Location	
THEME / FOCUS	
ACTIVITY 1	Prep, start-up exercise
ACTIVITY 2	Topic 1: 50 – 55 minutes
Break	5 minutes
ACTIVITY 3	Topic 2: 50 – 55 minutes
Break	5 minutes
ACTIVITY 4	Topic 3: 50 – 55 minutes
Break	5 minutes
ACTIVITY 5	Topic 4: 25 - 30 minutes (or move to wrap-up)
WRAP UP AND ACTION STEPS	20 – 30 minutes
MAJOR TAKE-AWAYS	1. 2. 3.
FOLLOW-UP AND ACTION STEPS	1. 2. 3.

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LESSON 3 WORKSHEET

Day of Offsite Checklist

Modify to fit your needs

- Agenda (printed)
- Your capture tools (notebook, pencils, sharpeners, pens, erasers, tablet, post-it notes, voice recorder, etc.)
- Headphones and music (or ambient sounds) or ear plugs
- Snacks
- Drinks
- Interrupters to eliminate

LESSON 4 WORKSHEET

Wrap-up and Action Steps

1. Wrap-up Priming Questions (add your own too)

- What am I doing that I want to stop, what am I doing that I want to continue, and what new projects do I want to start?
- What were my key insights?
- What do I want to make sure I don't forget?
- What in my thinking changed?
- What do I want to explore in more detail?
- Are there people I want to follow-up with?
- What surprised me about today?
- What ideas do I see as priorities of some kind?
- Other questions you might add:

2. Action Steps

Strongly suggested.

- Tomorrow, type all notes and arrange them into a loose outline, organized by projects or topics, and make a first pass at priorities.
- Transfer key elements from that outline to my to-do list and calendar.
- Write down at least one more action step using the SMART approach (specific, measurable, achievable, realistic, and time-bound).

3. Enter these blank items into your offsite agenda in advance.

MAJOR TAKE-AWAYS	1. 2. 3.

FOLLOW-UP AND ACTION STEPS	1. 2. 3.
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LESSON 5 WORKSHEET

End of Course Action Steps

1. Use this worksheet to create your personalized action steps. At least three of them.
2. Set a date for your offsite and put it on your calendar as an unbreakable appointment.
3. Start of list with the Topics and Big Questions you would like to focus on in your Personal Quarterly Offsite, look at it once a day, and add new thoughts and ideas as they come to you.

YOUR THREE ACTION STEPS:

1.

2.

3.