

## AQMeets Monthly Masteries

**Purpose:** To stop a month from becoming a blur of motion, and turn it into a season of meaningful execution.

**Aim:** Design the month around ONE lever that reliably produces progress, with clear proof, realistic capacity, and built-in corrections.

### Workshop Details:

<b>Month / dates covered:</b> (from xx/xx → to xx/xx)	
<b>Annual Aim / Decade-Year:</b> (1–3 words motto)	
<b>Quarterly Quest theme:</b>	
<b>Workshop date:</b> (today's date)	

### Materials:

- Annual Aims workbook (12 goals / user stories)
- Quarterly Quest plan
- Backlog / Index of Ideas journal
- Last 4 Weekly Wrap worksheets
- Optional: Daily Directives stack (for extra evidence)

### Outputs:

- Annual re-anchor: 3–5 annual user stories pulled forward (with proof lines)
- Quarter status: on track / at risk / off track + one countermeasure
- Reality snapshots: strengths, gaps, interventions, meaning moments, and the month's "3 big things"
- One main gap analyzed (with root cause + countermeasure options)
- This Month's ONE Result (finish line + proof) + 4-week big rocks matrix
- Habit contract + tracking target (days out of 30) + reinforcement plan
- Peer review commitments + next check-in booked (with proof to bring)

**Agenda:**

Section	Focus	Time
O) Opening	Frame the month + set workshop intention	~ 5 mins
A) Intention	Annual aims + quarterly quest + backlog re-anchor	~ 30 mins
B) Reality	Review last 4 Weekly Wraps + meaning audit + monthly score	~ 45 mins
C) Analysis	Root cause + leverage point (month-level)	~ 30 mins
D) Planning	This Month's ONE Result + 4-week big rocks + risk plan	~ 45 mins
Close	Celebrate + one sentence commitment	~ 5 min
-----	----- 10 Min Break ----- PRO MEMBERS:	-----
E) Peer Review (pro)	Proof + commitment + next check-in booked	15–25 min
F) Habit Formation (pro)	Atomic habit builder + integration into Daily/Weekly	25–40 min
Close	Celebrate + one sentence commitment	5 min

**Opening Frame:**

**Monthly Masteries is not a checkbox ritual.** We are having here a monthly moment of 'authorship' — where we retrieve our promises, face our reality, find our leverage instruments, and design the month we're choosing to live.

**Workshop intention (one sentence):**

(At the end of this workshop, the month will be designed and my path ahead will be clear.)

## **A) Intention : Retrieve What You Meant To Do**

**Instruction:** Re-read your Annual Aims workbook, your Quarterly Quest plan, and Backlog/Index journal. Here, we'll pull forward what matters from today's vantage point, and before the month gets filled by noise.

### **A1) Annual Aims & Quarterly Quest : Pull Forward 3-5 Goals (as user stories) (20 min)**

From your Quarterly Quest decision, to your 12 Annual Aims that you created in your start of year previously - choose 3 to 5 goals to write out as user stories. Start with the Quarterly Quest as the first one and then continue with the other Annual Aims.

Use the following framework to guide you in expressing this:

**AS** *[the role in your life that want expressed]*

**I WANT** *[the result/capability you're building by year-end]*

**SO THAT** *[why it matters - the value created]*

**DONE LOOKS LIKE:** *[metric + target + date]*

**SCOPE (IN):** *[what you will do]*

**SCOPE (OUT):** *[what you will not do]*

**CONSTRAINTS:** *[time, money, energy, ethical limits]*

**PROOF / RECEIPTS:** *[what you'll point to as evidence]*

#### **Productivity goal example:**

As a business owner seeking to be of greater influence, I want to establish a youtube channel and establish a regular publishing routine, so that I can serve others to better lead, to generate new leads, and to expand my knowledge.

**DONE LOOKS LIKE:** 50 published videos by 31 Dec

**SCOPE (IN):** publish weekly 10-minute videos

**SCOPE (OUT):** consume non-work youtube content

**PROOF:** channel that has 50 listed videos

#### **Personal capacity goal example:**

As an effective self-leader, I want a consistent morning operating rhythm, via the Daily Directives so that my days stop bleeding into distraction and I execute calmly.

**DONE LOOKS LIKE:** 250 "clean mornings" logged by 31 Dec 2026 (Daily Directives completed).

**CONSTRAINTS:** no phone before completing my worksheet

**PROOF:** completed 250 Daily Directives in the binder.

Bring your most pressing goals into your awareness for the month, *as you intended earlier:*

<b>Goal #1: Quarterly Quest</b>	
<b>AS</b> <i>[the role in your life that want expressed]</i>	
<b>I WANT</b> <i>[the result/capability you're building by year-end]</i>	
<b>SO THAT</b> <i>[why it matters - the value created]</i>	
<b>DONE LOOKS LIKE:</b> <i>[metric + target + date]</i>	
<b>SCOPE (IN):</b> <i>[what you will do]</i>	
<b>SCOPE (OUT):</b> <i>[what you will not do]</i>	
<b>CONSTRAINTS:</b> <i>[time, money, energy, ethical limits]</i>	
<b>PROOF / RECEIPTS:</b> <i>[what you'll point to as evidence]</i>	

<b>Goal #2: Annual Aims</b>	
<b>AS</b> <i>[the role in your life that want expressed]</i>	
<b>I WANT</b> <i>[the result/capability you're building by year-end]</i>	
<b>SO THAT</b> <i>[why it matters - the value created]</i>	
<b>DONE LOOKS LIKE:</b> <i>[metric + target + date]</i>	
<b>SCOPE (IN):</b> <i>[what you will do]</i>	

<b>SCOPE (OUT):</b> <i>[what you will not do]</i>	
<b>CONSTRAINTS:</b> <i>[time, money, energy, ethical limits]</i>	
<b>PROOF / RECEIPTS:</b> <i>[what you'll point to as evidence]</i>	

<b>Goal #3: Annual Aims</b>	
<b>AS</b> <i>[the role in your life that want expressed]</i>	
<b>I WANT</b> <i>[the result/capability you're building by year-end]</i>	
<b>SO THAT</b> <i>[why it matters - the value created]</i>	
<b>DONE LOOKS LIKE:</b> <i>[metric + target + date]</i>	
<b>SCOPE (IN):</b> <i>[what you will do]</i>	
<b>SCOPE (OUT):</b> <i>[what you will not do]</i>	
<b>CONSTRAINTS:</b> <i>[time, money, energy, ethical limits]</i>	
<b>PROOF / RECEIPTS:</b> <i>[what you'll point to as evidence]</i>	

<b>Goal #4: Annual Aims</b>	
<b>AS</b> <i>[the role in your life that want expressed]</i>	
<b>I WANT</b> <i>[the result/capability you're building by year-end]</i>	

<b>SO THAT</b> <i>[why it matters - the value created]</i>	
<b>DONE LOOKS LIKE:</b> <i>[metric + target + date]</i>	
<b>SCOPE (IN):</b> <i>[what you will do]</i>	
<b>SCOPE (OUT):</b> <i>[what you will not do]</i>	
<b>CONSTRAINTS:</b> <i>[time, money, energy, ethical limits]</i>	
<b>PROOF / RECEIPTS:</b> <i>[what you'll point to as evidence]</i>	

<b>Goal #5: Annual Aims</b>	
<b>AS</b> <i>[the role in your life that want expressed]</i>	
<b>I WANT</b> <i>[the result/capability you're building by year-end]</i>	
<b>SO THAT</b> <i>[why it matters - the value created]</i>	
<b>DONE LOOKS LIKE:</b> <i>[metric + target + date]</i>	
<b>SCOPE (IN):</b> <i>[what you will do]</i>	
<b>SCOPE (OUT):</b> <i>[what you will not do]</i>	
<b>CONSTRAINTS:</b> <i>[time, money, energy, ethical limits]</i>	
<b>PROOF / RECEIPTS:</b> <i>[what you'll point to as evidence]</i>	

**A2) Backlog / Index of Ideas : Promote 2–3 items (5–10 min)**

Now open your backlog / Index of Ideas journal. Bring onto paper up to 10 candidate ideas (titles only).

Score each idea 1–5 on Alignment (moves the Decade-Year / Quarter), Value (impact), and Feasibility (can I actually ship it this month?). Total the score, then promote the top 1–3 ideas ONLY if they beat your current plan. For each promoted idea, define a finish line + proof.

**Backlog candidates worth keeping visible (up to 10):**

Backlogged Ideas: (titles)	Aligned: (1-5)	Value: (1-5)	Fea'ity: (1-5)	Total: (/15)

**Promotable Ideas? (2–3 only):**


**B) Reality : Face the Month You Actually Lived**

**Instruction:** Review your last 4 Weekly Wraps. The truth of the month is not in your hopes. It’s in your patterns and evidence.

**B1) Annual Aims sweep (12 goals) : What moved? (10 min)**

Scan your Annual Aims list and note what actually moved this last month (even if small). Remember, evidence beats memory...

Annual goal:	Moved this month? (Give a Percentage)	Evidence / notes / proof
Material:		
Formal:		
Agential:		
Final:		

**B2) Synthesis from last 4 Weekly Wraps (10 min)**

Observation	Notes
Top recurring strengths (max 3)	
Top recurring intention–execution gaps (max 3)	
Top interventions that worked (max 3)	
Top interventions that didn't work / keep failing (max 3)	

**B3) Scores + quarter progress (5 min)**

Score	1–10 (or %)
Monthly Execution Match	
Monthly Energy / Focus	
Monthly Meaningfulness	
Quarterly Quest progress this month (%)	

**Quarterly Status:**  On Track  Off Track

**Counter measure:** (one sentence)

**B4) The 3 big things I actually accomplished + Proofs/ receipts (5 min)**


**B5) Meaning Audit + Sprint Retro prompts (10 min)**

**3 Most meaningful moments were:**

<b>Moment</b>	<b>What made it meaningful?</b>

**Least meaningful drain (1):**

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**Why hollow / unfulfilling:**

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**Intuitive Prompts (quick):**

*What should I start next month?*

What should I stop?

What should I continue?

What was the biggest surprise this month?



### C) Analysis — Understand the Gap (Root Causes + Meaning)

**Instruction:** Parts A and B already established what was intended and what happened. Now we isolate the *dominant constraint*, diagnose it cleanly, and choose **one lever** with a **testable experiment**.

#### C0) Primary Gap Statement (Evidence-based) (3–5 min)

Write one sentence that captures the main gap you want to close next month — and cite 2–3 facts from Part B that prove it.

**Primary gap statement:**

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**Evidence (2–3 receipts from Part B):**

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#### C1) Dominant Constraint Lens (5 min)

A month is multi-causal — but improvement requires choosing the **one bottleneck** that, if changed, makes everything else easier.

**Which constraint do you think most limited you last month? (tick)**

- Time    Energy    Attention    Emotional bandwidth    Environment    Boundaries    Skill    Fear    Meaning    Support    Other: \_\_\_\_\_

“My main constraint for last month was...” (Describe)

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Evidence from Part B that proves this constraint exists: (2 - 3 facts)

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What did this constraint *force* me to do (or not do)?

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If this constraint remains next month, what will predictably happen again?

**Constraint hypothesis (one line):**

*“The month didn’t fail because of effort. It failed because...”*

**C2) Deeper Causes Map (10 min)**

List various possible causes for this constraint, under the following headings and consider what could be causal issues related to this constraint:

Category	Connected Causal Issues:
Self (skills/discipline/health)	
Systems (process/tools/calendar)	
Environment (space/interruptions)	
Social (people/commitments)	
Beliefs/assumptions (stories I’m running)	
Random/seasonal constraints	

### **C3) COM-B Diagnosis (10 min)**

Now let's further classify this constraint, so the deeper fix can come to light.

**Capability** (skills, clarity, stamina, focus, sleep, emotional regulation)

*What exactly was lacking?*

Tiny capability upgrade for next month (specific + small):

**Opportunity** (calendar, environment, tools, interruptions, support, constraints)

*What exactly got in the way?*

Tiny opportunity redesign next month (specific + small):

**Motivation** (meaning, reward, identity, fear, resentment, avoidance, low payoff)

*What was the real motivation issue?*

Tiny motivation lever next month (specific + small):

### **C4) Leveraged Output (7 min)**

This is where Analysis becomes a plan you can live.

**Key Realization** (So what?):

**Replicate** (what worked — do more of):

**Remove** (what harmed — reduce/stop):

**Redesign** (one condition to change — calendar/system/boundary):

**One lever (Now what?) – What’s the smallest change with the biggest return?**

“Next month, my one lever is: \_\_\_\_\_”

**Experiment statement (testable behavioral contract)**

When \_\_\_\_\_, I will \_\_\_\_\_, for \_\_\_\_\_, because \_\_\_\_\_.

**Weekly Wrap metric (number I will report weekly)**

“Each week, I will track: \_\_\_\_\_ (target: \_\_\_ / week)”

**Weekly proof due by Friday (receipt)**

“By Sunday, I will have: \_\_\_\_\_ (file/artefact/count)”

**Success criteria:**

What evidence will exist that this worked?

### D) Planning — Design Next Month (Big Rocks + Balance)

Instruction: Planning is not fantasy. It is the art of placing big rocks into a real calendar — with proof, protection, and a meaning anchor.

You are not planning “everything.” You are planning the month around:

**(1) the Month’s MAIN Result** and up to 3 MINOR Results, then

**(2) the One Lever experiment** you chose in Analysis. If the One Lever doesn’t land in the calendar, it becomes a nice idea — and nothing more.

#### D1) This Month’s MAJOR & (3) MINOR Results (10 mins)

Month’s MAIN Result:	
Finish line: what will be true at month-end? <i>(defined as true or false)</i>	
Monthly proof (what will exist or what number will move):	
Weekly lead metric (what proves momentum each week):	

**Why This Matters Most (value / leverage):**

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Baseline (start of month):	Target (by month-end):

<b>Month's MINOR Result (1)</b>	
Finish line: what will be true at month-end? <i>(define as true or false)</i>	
Proof <i>(ie. file/count/deliverable)</i>	

<b>Month's MINOR Result (2)</b>	
Finish line: what will be true at month-end? <i>(define as true or false)</i>	
Proof <i>(ie. file/count/deliverable)</i>	

<b>Month's MINOR Result (3)</b>	
Finish line: what will be true at month-end? <i>(define as true or false)</i>	
Proof <i>(ie. file/count/deliverable)</i>	

### **D2) 4-Week Big Rocks plan (10 mins)**

For each week: set a theme, choose max 3 big rocks, define proof, and place time blocks. Add one meaning anchor so you stay human.

**Rule of thumb:**

- Max **3 Big Rocks** per week (or else you're fantasy planning).
- The **One Lever experiment must appear every week**.
- Every week ends with **Proof due by Friday (or Saturday)**.
- If capacity < plan demand → **shrink proof or remove one Big Rock**.

Fill this in **Week 1–4**.

**Week 1 — Theme:**

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<b>3 Big Rocks:</b>	<b>Proof:</b>	<b>Time blocks:</b>
<b>My Meaning Anchor:</b>		

**Week 2 — Theme:**

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<b>3 Big Rocks:</b>	<b>Proof:</b>	<b>Time blocks:</b>
<b>My Meaning Anchor:</b>		

**Week 3 — Theme:**

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<b>3 Big Rocks:</b>	<b>Proof:</b>	<b>Time blocks:</b>
<b>My Meaning Anchor:</b>		

**Week 4 — Theme:**

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<b>3 Big Rocks:</b>	<b>Proof:</b>	<b>Time blocks:</b>
<b>My Meaning Anchor:</b>		

### D3) One Lever Experiment (Testable)

This month is an experiment, based on the Analysis in Section C. Please complete the statement below:

<b>When</b>	
<b>I will</b>	
<b>For</b>	
<b>Because</b>	

**Success criteria (how I will know this lever worked):**

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### D4) Risk plan (5–10 min)

**Likely obstacles (max 3) and countermeasures.**

Pre-decide responses to predictable failure points:

<b>Likely obstacles:</b>	<b>Countermeasures:</b> <i>(specific “if X, then Y” plans)</i>

**Boundary I will enforce this month (one line):**

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### D5) Mid-Month Review (Non-Negotiable)

Date scheduled:

Keep (what's working — do more of):

Kill (what's not working — stop):

Redesign (one condition to change - i.e. calendar, system, boundary):

### D6) Proof Pack

By month-end, the following proof will be compiled:

<b>Metric movement / numbers:</b>	
<b>Artifacts created:</b>	
<b>Key lessons learned (1-3 bullets):</b>	

### X) Close

Celebration if I hit my Month's ONE Result:

**One sentence commitment:**

*"This month, I will close the intention–reality gap by..."*