A **MANAGEMENT PLAYBOOK** BY

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The Pillars of Success

"Determine that the thing can & shall be done, & then we shall find the way."
Abraham Lincoln, 16th US President

The following concepts will help build a foundation for a profitable business model & an extraordinary customer service experience…
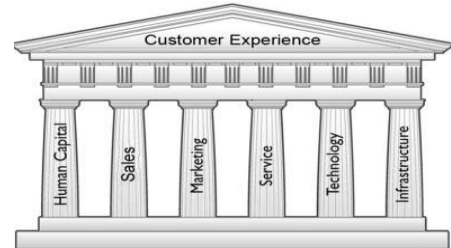
- **Integrity** | Advocate an uncompromising consistency in truthful actions, values, methods, principles, & expectations
- **People** | People are a company's greatest asset… so attract, recruit, hire, train, develop, & retain qualified professionals
- **Strategic Management** | Establish corporate methodology to sustain a competitive advantage in the related industry
- **Corporate Culture** | Establish a culture of trust, diversity, respect, open communication, & employee empowerment
- **Communication** | Promote open, honest, & solution-centric communication with both internal & external sources
- **Sales & Marketing** | Understand the business, the market, the competition, & implement the 4 P's of the Marketing Mix
- **Product** | Offer relevant products & services that meet the ever-changing needs & demands of our local client base
- **Value Creation** | Achieve product differentiation, cost leadership, or hybrid strategy to maximize value for stakeholders
- **Process** | Implement the company's formula for success, & design appropriate KPI's that expedite the corporate mission
- **Balance** | Establish a strong balance between productivity, efficiency, team objectives, & individual responsibilities
- **Growth** | Provide a stable path for proactive training, team development, & the achievement of personal SMART goals.
- **Transformational Leadership** | Recognize the need for improvement, cast a new vision, & then institute positive change

Leadership Philosophy

Leadership is a process of social influence which maximizes the positive efforts of others towards the achievement of a collective goal by:

- recognizing a need for critical improvement
- establishing a vision, model, or concept
- then institutionalizing positive change.

Management Philosophy

Management involves the efficient organization & effective coordination of the activities of a firm or business in order to achieve defined objectives & deliverables. It is often considered to be a component of production along with other resources such as machines, materials, & operating capital. Management comprises the integrated functions of creating corporate policy along with Organizing, Planning, Controlling, & Directing an organization's resources in order to achieve the objectives of that policy.

Management by Objectives (MBO)

- Be a champion of the company vision, while linking employee roles & responsibilities to the corporate mission
- Establish universal KPI's & personal SMART goals, while ensuring genuine team commitment & individual accountability
- Advocate consultative communication, while setting clear objectives & expectations for every single team member
- Implement the company's formula for success, & design appropriate deliverables that expedite the corporate mission
- Construct proactive & interactive operating methods that reduce process complexity & encourage innovative solutions.

General Management Principles

- Be a servant leader, one who guides by example & commits to coaching or developing the team to reach mutual goals
- Streamline existing processes or design new ones to fill gaps, reduce costs, eliminate waste, & improve gross efficiency
- Establish a strong balance between productivity, efficiency, team objectives, & individual responsibilities
- Strive for uniformity, accuracy, consistency, & code compliance to achieve a profitable & sustainable business operation
- In order to maintain corporate integrity with checks & balances, a successful manager should always "trust but verify"
- Establish consistency & efficiency by incorporating a daily "operational game plan" for team & individual functions
- The essential aspects of a great plan are simplicity, measurability, & individual accountability
- A manager cannot expect a client or subordinate to do something that he is not willing to do himself
- Historical precedent means nothing if the precedent is ultimately proven to be wrong or ineffective
- The strategy & solution that worked 5 years ago, last month, or even yesterday may not work today
- Develop a theme for the business model in order to create a lasting legacy & operational succession plan
- Delegate responsibilities to the team, & then hold each member accountable for his actions & targeted performance
- Assign a SME for each business unit or sales vertical in order to solve problems & address minor customer complaints


Strategic Position + Value Creation = Success

- Achieve product differentiation, cost leadership, or hybrid strategy to maximize value for stakeholders
- Build economies of scale, & then articulate a clear value proposition for the existing client base & prospective customers
- Understand the overall scope of competition within the industry, & then define the strategic position to be applied
- The Differentiation (Marketing) Strategy offers higher perceived value with unique features that are not easily replicated
- The Cost Leadership (Accounting) Strategy offers similar or comparable value as competition, but at a much lower cost
- The Hybrid (Integration) Strategy offers trade-offs between D + CL strategies by impacting both costs & perceived value
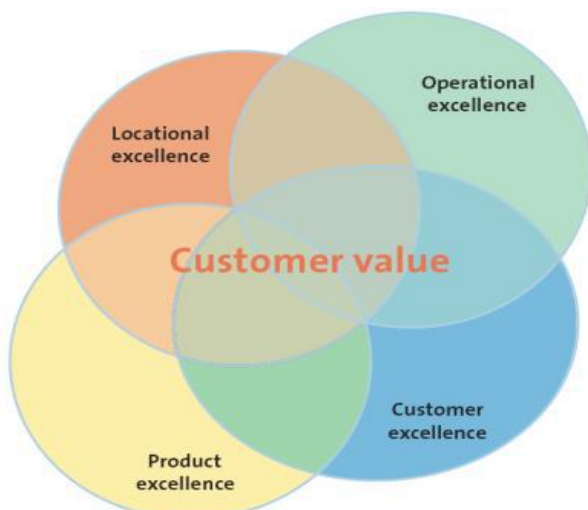
Performance Over Time

Corporate Culture

- Does the existing culture promote apathy, complacency, or excellence?
- Remain diligent in engineering a culture that advocates excellence & top performance at every level of the business
- Establish a positive theme of trust, diversity, respect, professionalism, open communication, & employee empowerment
- Create an atmosphere that encourages strong attendance, emphasizing that "our company & our customers count on us"
- Encourage a spirit of proactive involvement, ingenuity, & innovation that will generate new ideas & fresh solutions
- Discourage negative or offensive actions that may destroy team cohesion, especially any type of delinquent behavior
- Maintain an open door policy, while minimizing the perceived level of power distance when appropriate
- Be efficient, follow protocol, keep data organized, maintain a clean work space, & simplify processes when possible
- Strive to achieve corporate integrity, ingenuity, social equality, & environmental responsibility… Reduce, re-use, & recycle!

Communication Strategy

- Encourage open, honest, & solution-centric communication with both internal & external company sources
- Communicate all team or individual expectations with clarity, be as specific as possible, & repeat as often as necessary
- Expedite the transfer of valuable knowledge by promoting interdepartmental or cross-channel communication
- Coordinate periodic follow-up calls & team meetings to assess productivity & discuss any critical issues or initiatives
- Private or proprietary company information must be protected & safeguarded with a high level of discernment
- Excessive slander & negative gossip are extremely toxic to any organization, & this activity will not be tolerated
- Conflict involving internal employees or external clients may require managerial action for proper dispute resolution

Consumer Relations Management

— Customer Service —
IS AN ATTITUDE
NOT A DEPARTMENT.

Whether it's realized or not, every single employee is involved in CRM (since all work activity impacts client relationships). Our primary responsibility is to fill a void, meet a need, or solve a problem… so we must excel at each level of support. Every single client matters to the firm, regardless of whether he is a former, existing, or prospective business customer. One size does not fill all situations, & we may sometimes need to provide customized solutions to earn more business. Every client has unique needs, desires, fears, expectations, limits, & experiences… so we must listen to understand them. Offer multiple channels of communication that may include phone, fax, text, e-mail, live chat, instant message, or on-site appointments. Customer follow-up is essential to establishing loyalty, but it is not often practiced effectively or consistently. If we succeed in the area of consumer relations, then the company's brand equity will grow & consumer loyalty will be fortified.

Principles of Sales & Marketing

The fundamental purpose of marketing is to create value & effectively satisfy the needs & desires of consumers *(not merely to sell a product or service)*, which establishes a long-term relationship of consumer loyalty & retention. The genesis of marketing occurs in Psychology & Sociology, while the sales process requires an exchange resulting from the optimal Marketing Mix of Product, Price, Place, & Promotion (the 4 P's).

The Product creates value, the Price captures value, the Place delivers value, & the Promotion communicates value to the prospective consumer.

The (3) phases of a Marketing Strategic Plan involves:
- Planning,
- Implementation, &
- Controlling.
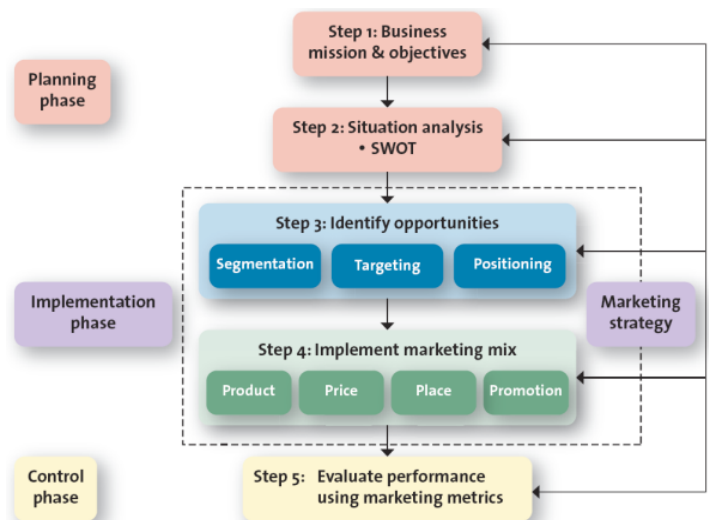
Sales & Marketing Research

- Who are the target clients? Who are the dominate competitors? What are the biggest threats to economic growth?
- Conduct a marketing demographic analysis to study factors of age, income, education, ethnicity, gender, & geography
- Perform a SWOT analysis in order to determine strengths vs. weaknesses (internal) & opportunities vs. threats (external)
- Know the purchasing power of consumers in the target market, & consider multiple PESTEL variables in the sales strategy
- The PESTEL framework highlights political, economic, social, environmental, & legal factors within the market & industry
- Engage in independent research in order to reinforce product knowledge & to learn about new concepts or strategies
- Study the impact of rising social trends such as price elasticity, health & privacy concerns, & environmental responsibility
- Consider evolving trends of consumer behavior, which will be significantly impacted by perceived value (cost vs. benefits)
- Mitigate the "knowledge gap" by actively discovering consumer needs, desires, fears, limitations, & overall expectations
- Collect vital marketing data by exploratory research or conclusive research methods, & then perform statistical analysis
- Analyze the marketing data, converge the data into useful information, & then develop relevant management strategies.


Sales & Marketing Strategy

- Understand the business, the competition, market segmentation factors, & implement the 4 P's of the Marketing Mix
- Establish a proactive & integrative (not reactive) sales campaign that identifies service needs & provides viable solutions
- Always ensure that the sales team has the tools, curriculum, & collateral necessary to achieve their quota objectives
- Leverage brand equity in order to articulate quality & value, while discovering new ways to earn a competitive advantage
- If a competitor yields a competitive advantage, consider methods whereby it can either be mitigated or replicated
- Services are intangible & therefore require cues or images with an atmosphere that conveys value in order to create sales
- Engage various negotiating tactics in order to generate a collaborative sales approach that leads to "win-win" solutions
- Ask questions, listen earnestly, & learn the client's overall perceptions as well as their "zone of tolerance" for closing
- Always remember to under-promise & over-deliver, ensuring that a guarantee is never to be made if it can't be honored
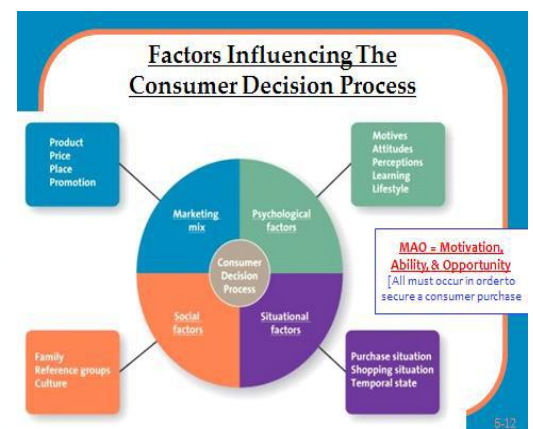
Sales Management

- Whether it's realized or not, every single employee is involved in sales (since all work activity impacts revenue generation)
- Manage existing sales funnels in order to analyze the projected sales forecasts & then make adjustments accordingly
- Actively promote new sources of revenue generation, & turn each operating unit into an autonomous profit center
- The ultimate achievement in sales or team management is the execution of a "worst to first" performance scenario.
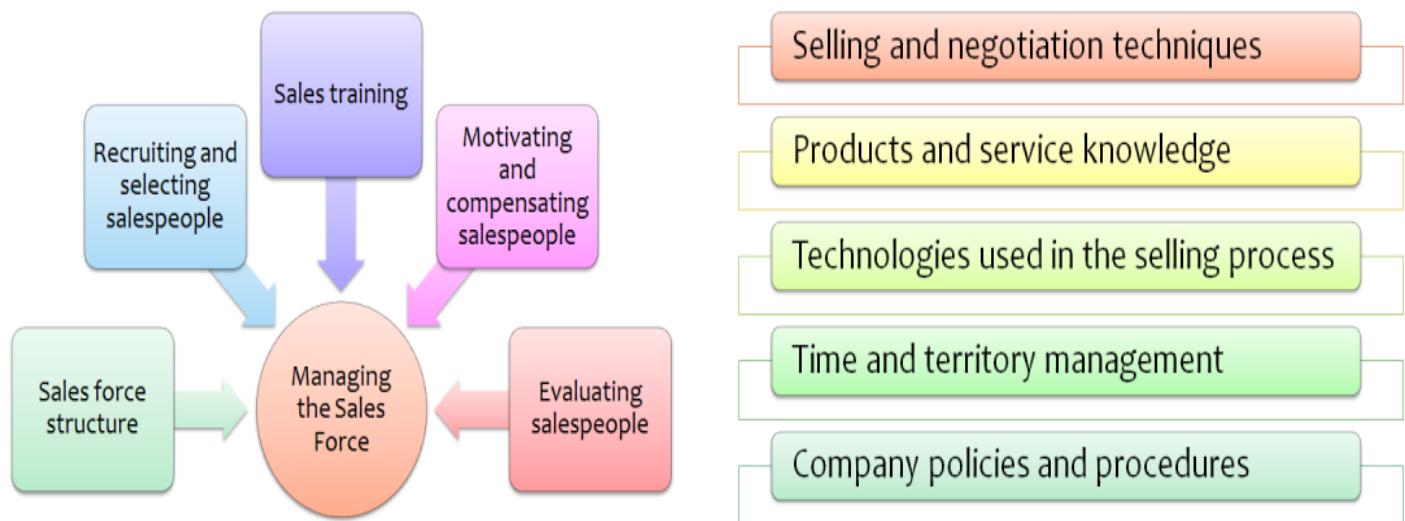
Employee Training & Development
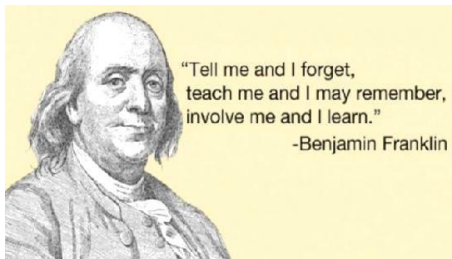
Don't focus merely upon building the business. Build the people instead, & those people will ultimately build the business & take it to new levels of success. Proactively lead, direct, guide, coach, train, & develop as often as needed for continual growth & progression. Periodically remind employees to take advantage of internal training programs, while also encouraging them to participate in advanced academic curriculum through external resources as well. Continuous product knowledge & customer service training are prerequisites for achieving long-term stability & profitability.

Crisis Management Plan

- CM is the process by which an organization mitigates risk & resolves any threat to the firm, its stakeholders, or the public
- An assigned SME from each department or division should be involved in the design of a formal crisis management plan
- Any contingency plan must consider local, regional, & corporate implications regarding a legal, personal, or property crisis
- A crisis event in any form should be escalated to the corresponding supervisor, manager, director, or VP as appropriate
- Planned crisis exercises shall be conducted periodically in order to promote a state of safety, security, & preparedness.

Performance Metrics

- What are the Key Performance Indicators (KPI's) for each employee, team, unit, division, or region?
- How are the various KPI metrics quantified, evaluated, & communicated within the organization?
- Implement specific performance metrics in order to monitor for accuracy, productivity, efficiency, & compliance
- Engineering KPI's include code compliance, design accuracy, cost viability, solution effectiveness, project deliverables, etc
- Operational KPI's include productivity, efficiency, attendance, punctuality, quality assurance, corporate objectives, etc
- Sales KPI's include contacts made, leads generated, closing ratios, financial quotas, IRR's, NRC's, MRC's, renewals, etc
- Personalized KPI's include time management, SMART goals, academic advancement, growth, overall professionalism, etc
- Team KPI's include social group dynamics, cross-channel communication, adherence to corporate policy guidelines, etc
- Performance classifications include: Inactive, Reactive, Proactive, Integrative or Poor, Adequate, Good, Great, Excellent, etc.

Performance Management

- What are the primary performance roadblocks? What are potential solutions to improve performance?
- Is it a "skill" or a "will" issue? Is it a "training" or a "motivation" issue? Is it a "staffing" or a "management" issue?
- How does this particular employee, unit, division, or region compare to other internal or external sources of competition?
- Without solid strategy, strong leadership, & proper management… superior teams can still generate inferior performance
- Periodically review KPI's, conduct a trend analysis, & investigate any positive or negative changes in overall results
- Conduct a comparative analysis to identify any performance anomalies, & then ask Q's to determine potential root causes
- Ask "Why?" or "What's wrong?"… & perform an objective situational analysis similar to peeling back the layers of an onion
- Listen carefully to the employee to accurately discern between excuses versus real deficiencies or systemic problems
- In most cases, poor performance is NOT a result of defective tools, equipment, systems, processes, or recruiting practices
- Instead, poor performance is most often a direct result of leadership voids, adverse management, or failed communication
- Anyone can manage while operations are smooth, but management matters the most when "the train falls off the track"
- In the context of a bell curve… Recognize the top quartile, manage the middle, & progressively discipline the lower quartile
- The firm doesn't necessarily need an All-Star at every position, but it does need consistency in performance & attendance
- Growing trends in employee tardiness & absences always correlate to a larger performance-related problem to be resolved
- The lower quartile "laggers" may require micromanagement, aggressive coaching, & extensive developmental tactics
- Not every "lagger" must be fired, since most failing employees can be rehabilitated under the right coaching & leadership
- Promptly address non-compliance or low performance trends by implementing a Performance Improvement Plan (PIP)
- As necessary, apply various tactics in progressive discipline, conflict resolution, or incremental termination proceedings
- Remain calm & patient with low performers, but ultimately the only 2 options are to coach them *up* or coach them *out*
- To improve individual performance, each employee should perform a SWOT analysis & establish personal SMART goals
- SWOT – Strengths, Weaknesses, Opportunities and Threats
- Whether short-term or long-term, all personal & professional goals must be written… Otherwise, they are not concrete
- Build trust, give respect, deliver motivation, maintain accountability, & focus on the person's potential (not on the past)
- The management team should periodically monitor for progress of goals while encouraging continuous development.

Rewards & Recognition

- Dynamic competition is a natural fuel that ignites optimal performance, so publish singular or team results on a scoreboard
- Performance results may rank & assess each employee, team, manager, or divisional results each quarter for open review
- Published results will embolden top performers & should motivate lower performers to make adjustments in their strategy
- Recognize minor & major accomplishments to periodically celebrate success, achievements, & innovations across all levels
- Achievement awards can come in the form of verbal recognition, certificates, plaques, novelties, or monetary incentives
- Establish a "Big Banana", "Wall of Fame", or "Employee of the Month" program to incentivize performance enhancements
- Consider free or inexpensive forms of team recognition, which could have more intrinsic value than a physical gift or award

Employee Recognition   **Money / Prizes**   **Teamwork / Goal Attainment**

Employee Relations Management

- People are a company's greatest asset… Attract, recruit, hire, train, develop, preserve, & promote qualified professionals
- An influential manager conveys genuine interest & personal concern for his clients & internal employees to establish trust
- Treat every customer, vendor, contractor, or employee with dignity, respect, compassion, & diplomacy in every situation
- Remain firm when necessary, be flexible when appropriate, & empower employees to do the right thing at all times
- Most employees desire to have an advocate or mentor that conveys sympathy, encouragement, & professional support
- Success comes by motivation… Everyone is motivated by something (intrinsically or extrinsically), so be sure to discover it
- Promote networking events that will shape interaction, build new friendships, & create a family-friendly environment
- Encourage the team by e-mailing an inspirational "Quote of the Day" to keep them motivated each day of the week
- Be a servant leader, one who guides by example & not mere authority… Remember to smile, be happy, & enjoy life! =)
- "Train people well enough so they can leave, but treat them well enough so they don't want to." | Richard Branson

Have Fun!!!

- Running an organization must be fun & exciting… It cannot be overly-mechanical & operate like a rusty-old-machine
- Nothing motivates a team & improves organizational commitment like a fun, optimistic, & exciting work environment
- Bring a box of bagels or donuts into the office every Friday, as this gives the team something positive to anticipate
- Design fun activities for employees to enjoy while on break at the office, such as mini-golf, basketball, or video games
- Coordinate "ice breaker" social events in order to relieve stress, improve group dynamics, & increase team socialization
- Having fun at work improves performance, promotes employee retention, & strengthens organizational commitment
- Some examples of social events include company BBQ's, birthday parties, bowling nights, billiard tournaments, etc.

Games

Celebrations

Involvement