

Guidelines, Lists and Diagrams

Play #1. **Your Idea**

Play #2. **Creating Differentiation**

There are numerous ways to create differentiation:

- Offer a unique product or service
- Offer a unique business model
- Provide world-class customer service
- Have an impressive Corporate Social Responsibility (CSR) program
- Provide convenient locations
- Receive excellent referrals from customers
- Have a celebrity spokesperson
- Offer the best tasting food
- Offer the lowest price
- Provide the fastest delivery
- Thank customers in a unique way

Play # 3. **Competitive Advantage Categories**

A Competitive Advantage may be achieved from any of the following:

- **Financial Advantages**
 - Access to inexpensive capital

***Inexpensive Capital:** A source of funds having very favorable interest rates and/or repayment terms.*

- Access to a significant amount of capital (this is often a key difference between Fortune 500 companies and small businesses)
- Ability to manufacture products or offer services at a lower cost
- Competitive pricing
- Higher sales compensation
- **Human/Personnel Advantages**
 - Superior industry knowledge
 - Business contacts and relationships
 - Qualified team comprised of experienced leadership and/or skilled labor
- **Intellectual Advantages**
 - Trade secrets, like proprietary software or a secret recipe
 - Patents, copyrights, and intellectual property
 - A unique product, business model, opportunity, or experience
 - Strong brand recognition
 - Extensive company history
 - Positive reputation
- **Space/Physical Advantages**
 - Superior retail location
 - Geographic location that features proximity to resources and distribution methods

- **Performance Advantages**
 - Ability to perform a service that the competition can't or won't perform
 - Customization
 - World Class customer service
 - Operational excellence
 - Company values, such as a corporate social responsibility program
- **Strategic Advantages**
 - Offering a unique business model that the competition can't or won't offer

Play # 4. How to Bring value to a customer:

- Solving a problem
- Increasing revenue or profit
- Lowering cost
- Creating a unique opportunity or experience
- Improving quality
- Increasing productivity
- Providing faster delivery
- Delivering better health outcomes
- Providing superior service
- Being easy to use

Play #5. Characteristics of a captivating Unique Selling Proposition:

- Consists of as few words as possible.

- Captures the essence of what you are offering.
- Demonstrates with specificity your case against your competition. It's not a generic statement like *We have great customer service*. Rather, it's something like *Rated Number One in Service Seven Years in a Row!*
- Speaks to what your target customers care about.
- Connotes action by using verbs such as: create, innovate, get, remember, turning, move, start.
- Uses qualifying adjectives such as: new, stunning, smarter, simplest, solution, and great.

Play #6. Mission Statement templates:

- **TEMPLATE 1:** The mission of [Company Name] is to offer our customers [name your offered products and services, using phrases such as *competitive prices, great service, and best quality*]. The company will earn a profit and increase value for everyone we work with and for. Our employees will experience [list the qualities of the working environment].
- **TEMPLATE 2:** [Company name]'s mission is to [build or offer] the highest quality [name your offered product or service]. We will provide our employees with [list of monetary and non-monetary benefits that employees will experience] and increase value for everyone we work with and for. We will be good neighbors by giving back to the community through [names of various Corporate Social Responsibility activities].

Play #7. Guidelines for Creating a Company Name:

- **Let your Points of Differentiation, Competitive Advantages, Value Proposition, Unique Selling Proposition, and Mission Statement guide your choice of Company Name.** Your Unique Selling Proposition may give you the best suggestion for your name. For example, if you're a plumber, then I would suggest that the word *Plumbing* should be in your name. If you believe that one segment of your USP is that you're available twenty-four hours a day, then perhaps your name could be *24 Hour Plumbing*. Decide what do you want to be known for: fast, reliable, low cost, 24 hour service. There are many choices. Another example: *All American 24 Hour Plumbing*.
- **Consider who makes up your Target Market.** By that, I mean you should understand their demographics and what type of communication will appeal to the customers you want to attract to your business.
- **Avoid choosing an abstract name.** Having a unique or creative Company Name is great *if it also describes your business*. But if your Company Name has no apparent connection to your product or service, it will take more time and more money to get people to understand what you do. I'm not saying it's totally wrong to have an abstract name, only that it puts significantly more pressure on your marketing efforts. An abstract Company Name means you'll have to work harder to communicate effectively what you do and why people should do business with you.
- **Check the availability of your Company Name.** Once you have selected a Company Name that you think will work, the next step is to check your state's corporation commission website to see if it's available to be incorporated. If it is

available, save the Company Name. (There will be instructions on the corporation commission website.) After that, check the availability of your Company Name with website domain managers. If the same name is available, great! If not, you'll have to alter your domain name to one that is available and as close to your Company Name as possible.

- **Avoid using a Company Name that's similar to one of a competitor.** For example, let's say that *Jones Home Electric* isn't available, but a slight change to *Jones & Son's Home Electric* would work. Even if the state corporation commission would allow the name, I caution against it, because the name is just too close to the competitor's name, *Jones Home Electric*. Something like *Superior Home Electric* might be a better choice. Another point I'd like to make here is that you may want to stay away from using your name as part of the company name. A more descriptive name like *Superior Home Electric* is much more transferable to a new owner if you decide to sell the company down the road.
- **Avoid limiting yourself geographically or with product or service offerings.** If you think you might ever be doing business outside your geographic location, or you might want to expand your company's products or services, don't use a Company Name that contains a specific location or limits your product or service offering. For instance, if you were to start a company named *Buffalo Lawn Service* and later decided to expand your offering to include house painting — and/or you wanted to open a satellite office in Rochester — then the Company Name just wouldn't work. In contrast, if you had started with *Superior Home Maintenance*, you could go anywhere and offer a variety of home maintenance services.

- **Remember that simple is better.** The shorter your Company Name, the better. The easier it is to spell, pronounce, and remember, the better. From the very beginning, make it as easy as possible for people to do business with you. And remember — for potential customers, your Company Name is at the very beginning of the decision making process to buy your product or service!

Play #8. Guidelines for Developing a Memorable Tagline:

- Keep it as short as possible.
- Don't be too abstract. Abstract means you'll spend more money and time to get customers to remember you.
- Try to use your Company Name and product.
- Use your Tagline to communicate your USP.
- Make sure your Tagline connects with your customers and employees.

Play #9. Guidelines for developing a Logo:

- Keep it as simple as possible.
- Avoid being too abstract.
- Make it impactful.
- Ensure it supports your Unique Selling Proposition and/or your Tagline.
- Try to incorporate your Company Name or initials.

Play #10. SWOT analysis questions:

Note that this is a partial list. You may think of other questions that are unique to your idea and your situation.

A quadrant like the one shown here can be helpful as you answer the questions below.



- **Competition Questions**

- Who is my competition?
- What does my competition do well? What do they do poorly?
- How can I differentiate my company from the competition? (*Play #2.*

Differentiation)

- What are my company's Competitive Advantages? (*Play #3. Competitive Advantages*)
- How do my competitors market their products/services?
- How can I improve on my competitors' marketing techniques?
- How can I improve on my competitors' products/services?
- **Branding Tools Questions**
 - In what ways will my Value Proposition resonate with customers and cause them to want to do business with me? (*Play #4. Value Proposition*)
 - In what ways does my Unique Selling Proposition grab customers, so they'll want to know more? [*Play #5. Unique Selling Proposition (USP)*]
 - Does my Company Name communicate what my company does? (*Play #7. Company Name*)
- **Target Market Questions**
 - Who is my ideal customer?
 - How large is my Target Market?
 - What trends might positively or negatively affect my Target Market?
- **Logistical, Technical, and Knowledge Questions**
 - Where will I locate the business (whether it's a brick-and-mortar or online / electronic commerce company)? One location or multiple?
 - What laws or regulations have the potential to cause problems?
 - In what ways does my expertise qualify me to start and run the business?
 - Which other content experts, if any, do I need to hire?
 - What technical support do I need?

- What suppliers of products or services will I need?
- How many employees will I need for the startup?
- **Personal and Professional Questions**
 - What factors (personal and professional) make me believe I have the necessary time and energy required to devote to the business?
 - What are my goals, both personal and for the business?
 - How much money do I want to make?
 - How will I handle the downside if the business is not successful?
 - Who, if anyone, could I turn to as a potential coach or mentor?
 - What funding do I have available that will allow me to reach breakeven? (*Play #11. First Financial Forecast and Executive Summary*)

Play #10. SWOT Analysis Information Sources:

There are numerous sources available for you to gather information.

- **Competition.** The single best source for doing your research is companies that you will be competing against. Find out everything you can about them! What are their strong points? What are their weak points? What do their websites look like? What are their Differentiators, their Value Propositions, Unique Selling Propositions, Target Market, and products? How many products do they sell per week, month, or year? Find out everything!
- **Potential Users.** People and companies that are potential users of your idea for a product or service are a great source. A user is anyone who uses products or services such as those you want to offer, or someone who has firsthand knowledge about this

type of product/service. Most users will tell you what they like and don't like about products, pricing, customer service, and anything else that you wish to ask them about the industry in question. The key to getting the real scoop from them is to make your inquiry as personal as possible. Let the individual know that you need their help and wish to hear their candid opinion. Most people like to help other people, and users are no different. Make sure they understand that you will not be offended if, in their opinion, your idea does not have merit.

If the user is a company, try to communicate with the highest-ranking user in the company that you can possibly find. For any user, a face-to-face visit is best. Make time to visit with as many different users as possible. If a face-to-face meeting isn't possible or practical, try a phone call, a personalized email, or a general customer survey (in descending order of effectiveness).

- **Employees.** If you have an existing company, your employees are a great source of knowledge, especially those who interact with customers. Many times, customers will tell employees things that they will not tell management. Encourage your employees to ask customers for their opinions about your company, current products and/or services, and their ideas for additional products/services to offer. Make sure your employees know that you want to hear both good and bad news — and that you won't shoot the messenger.
- **Industry Associations.** Associations are another good source for knowledge. You should attend as many events as possible and build relationships with people in the same industry as your idea. Be sure to focus on those from different geographic marketplaces than yours. Generally, if you aren't located in the same geographic area,

there will be less fear of competition. That means all of you can feel free to discuss issues and brainstorm possible solutions. Creating these informal think tanks can prove invaluable.

- **Advisory Board.** Form an Advisory Board consisting of people from different business disciplines and experience levels. Conduct periodic meetings in which you ask them for their thoughts on the challenges you're facing. Make sure that this group is representative of your Target Market.
- **Local Business Newspapers and Trade Magazines.** These publications provide plenty of information about what's happening in your Target Market and your industry.
- **Brainstorming Sessions.** If you're already in business, conduct brainstorming sessions with your team. This is a great way to build team spirit and solve problems. Make sure that all areas of the company are represented during these sessions. The solution for a problem in sales may reside in manufacturing or accounting. If you're not in business yet, organize brainstorming sessions with a group of friends or individuals whose specific business interests mean they can provide valid input regarding your idea.
- **Online Resources.** The internet can be a great source of knowledge. The caution here is to make sure that the information is accurate. To do that, check several different sources. The internet is also a great source of brand awareness. Look at what you like and don't like as you build a greater understanding of brand awareness.

Play #12. Traits of a Great Leader:

1. Personality Traits

- **Accountability:** Takes responsibility for everyone's performance
- **Charisma:** Exudes an air that causes people to like them and want to follow them
- **Confidence:** Has confidence without being brash or cocky
- **Courage:** Is not afraid to confront flaws in the team or self
- **Discipline:** Does what they say they're going to do — every time, on time
- **Emotional Intelligence:** Is sensitive and empathetic
- **Excellent Character:** Can be trusted in all respects
- **Execution Focus:** Concentrates on results
- **Humility:** Puts ego aside and surrounds self with people smarter than they are in specific areas
- **Passion and Energy:** Has passion and energy that radiates to everyone who encounters them
- **“People” Appeal:** Enjoys being with the members of the team
- **Truthfulness:** Has the capacity to be open, honest, and forthright; always tells the truth with a zero tolerance for dishonesty in others
- **Vision:** Has the ability to see the future and help the team see it too
- **Work Ethic:** Gives whatever effort it takes to accomplish the task

2. Skills

- **Ability to Attract Great People:** Knows how to find great people and place them in the right positions
- **Ability to Accept No Credit:** Knows how to give all the credit to team members

- **Communication Skills:** Excels in all four phases of communication: verbal, written, listening, and body language
- **Delegation Skills:** Doesn't do anything that someone else can do as well or better
- **General Knowledge:** Possesses a good knowledge base for the business or charity
- **Great Coaching Ability:** Doesn't tell people what to do, but instead coaches them on how to do it
- **Organizational Excellence:** Is highly organized, with the ability to prioritize tasks
- **Team Building Skills:** Can create a culture of team versus that of individuals

Play #13. **Guidelines for Great Website Design:**

Getting Started

- Select and acquire your domain name. The website domain name should be as short as possible, easy to remember, and related to your Company Name.
- Find a professional who can work with you to design your website. Interview several candidates before making a choice.

Goals

- Decide what you want your website to accomplish. In business, the primary goal of a website is to turn visitors into prospects or customers. You accomplish this with a clear, easily accessible Call to Action. What do you want prospects to do when they view your website? Make it simple for them to take that Action. The ultimate test for your website is for it to fulfill the marketing term **AIDA**. In other

words, it creates *Attention, Interest, Desire, and Action*. Whatever you want the prospect to do should be evident throughout the website. Do you want them to call, fill out a form, request a follow-up meeting, or make a purchase? Perhaps you want them to do all of these. The desired Action (or Actions) should be prominent on your Landing Page and mentioned several times.

There are also other goals to consider, such as:

- Building your brand reputation and awareness
- Improving interaction with existing and potential customers
- Increasing sales
- Becoming an authoritative resource
- Improving your customer's experience

Recognize what a visitor to your website may be looking for, such as:

- A clear understanding of what your company offers
- Contact information and location
- Third party validation (i.e., customer testimonials and awards)

Content

- Create a great Landing Page. Always remember that people will *browse* (not *read*) the website first. Therefore, you need to grab their attention right away.
- Place your most powerful Value Proposition, Unique Selling Proposition, and Points of Differentiation up front, where they'll be seen first.
- Prioritize your pages to tell your story. Again, put the most important information first, then work your way down the list, ending with applications and information requests.

- Include endorsements from clients or colleagues. They add value and credibility to your business.
- Use as few words as possible to communicate complete thoughts.
- Place more complex subjects under main headings as subtopics.
- On forms and applications, don't ask for more information than you absolutely need.

Visual Elements

- Use graphics and colors that are appropriate and fit your business.
- Use short videos where appropriate.

Testing

- Test your site for ease of use.
- Ask others to test your site using different browsers and devices.

Play #14. Ten Keys to Creating an Effective Brochure:

1. **Put your Unique Selling Proposition on the cover.** You want to grab the prospect's attention right away. The goal is to entice your prospect to open the brochure and review all the neat stuff on the inside. Your Unique Selling Proposition should act like a headline that draws your prospect in.
2. **Know your customer and give them what they want.** Remember the saying "*I am not my Target Market.*" Make sure your brochure speaks to all your products and services, not just the ones *you* believe are most important. Present them in the order that you think will be of greatest interest to your prospects.

3. **Develop a Brand with your brochure.** Use your brochure to develop a theme that will be carried throughout your marketing campaigns. (For more about Branding, see *Play #4. Value Proposition* and *Play #15. Marketing Plan.*)
4. **On the cover, use a single, large photo or graphic.** Research suggests that one large photo or graphic will be more effective than several small ones. Photos with story appeal that involve the brochure's reader are the most impactful.
5. **Inside the brochure, use photos that tell a story.** The right photographs can often express your positioning better than words. To illustrate your story, use photos instead of drawings. Photos suggest reality and are more likely to be recalled than drawings. You should always caption photos. Next to the words on the cover, captions are the best-read element of any brochure.
6. **Use the language of your customer.** For your brochure's copy, use words that your prospective customer will easily understand with no need for explanation. Look at your company through the eyes of your potential customers and tell them in plain language what you do and why they will benefit from doing business with you.
7. **Spotlight the important facts, but don't let your brochure copy get too long.** Tell your story in as few words as possible — but say everything that needs to be said. You don't want to lose your prospect in minutia. Sure, if appropriate, you can tell them prices, hours, and so on. But remember, this is just the first encounter they'll have with your company. The goal is to create a favorable impression so you can gain another meeting with the prospect.
8. **Create ACTION.** Again, remember AIDA (Attention, Interest, Desire, Action). Your brochure should create a *Call to Action* by the prospect. The desired Action (or Actions) should be mentioned several times.

9. **Solicit feedback.** Before publishing your brochure, put it through several editing phases. I suggest that you have members of your team and your Target Market review a polished draft of the brochure and provide feedback. Once the brochure copy is finalized, have a professional copy editor proofread the content for grammar and typos.
10. **Make your brochure look first-class.** Your brochure is your company and your product. When you aren't with the prospect, it's your salesperson. When deciding how much you can afford to spend on the brochure, ask yourself: "If this brochure brings me one more customer or one more sale, how much is that worth?" Then spend as much as you can afford.

Play #14. **Guidelines for Designing Your Business Card:**

Front of Card: Basic Information

- QR code linking to your contact information and website
- Company Name and Logo
- Company Tagline or Unique Selling Proposition
- Your name and title
- Company telephone and your cellphone number (purposely left off of Mark's business card image)
- Your email address
- Company website address
- Company physical address

Back of Card

- Tagline, Unique Selling Proposition, or a Call to Action
- Extra space for writing notes

Play #15. **Customer Value Journey (CVJ):**



Play #15. Sales Funnel:



Play #15. Marketing Plan Objectives:

1. **Awareness:** Target prospects know your product or service exists.
2. **Interest:** Once prospects are aware of you, their interest is created.
3. **Consideration:** What you've communicated to them gives everything they need to make a purchasing decision.

4. **Purchase:** The steps a new customer must take to purchase your product or service are clear and easy. The customer makes the purchase.
5. **Retention:** The customer becomes a repeat customer. You've put measures in place to attain the highest possible retention and repeat sales.
6. **Advocacy:** Your customer has become an advocate for referrals and five-star ratings.

Play #15. Critical Marketing Plan Questions:

1. **What is the primary goal(s) of your Marketing Plan?** Obviously, the primary goal for all Marketing Plans is to create sales. However, you might also have some secondary goals such as:
 - Test an idea, seeking input from prospective customers (initial research phase)
 - Inform your Target Market of your presence
 - Secure meetings with prospective customers in your Target Market
 - Ask for referrals from present customers
 - Increase brand awareness
 - Build your reputation as an authority
 - Increase Customer Loyalty

As mentioned above, your primary goal of increased sales will usually not change but your secondary goals will change. A well-crafted marketing plan can achieve more than one goal at a time.

2. **What message(s) are you going to communicate to achieve your goal(s) for the Marketing Plan?** Subjects your messages might include:

- Description of Products and Services
 - Pricing and payment options
 - Locations
 - Hours of operation
 - Examples of problem resolution
 - Your team
 - Company history
 - Social Responsibility examples
3. **What tactics or tools are you going to use to get your message out to your Target Market?**

Play #15. **Digital Marketing eight main channels:**

- **Search Engine Optimization (SEO):** A process to obtain a higher ranking in search results with Google and other search engines, causing increased search engine traffic to the business's website
- **Pay-Per-Click (PPC):** Paid advertisements to increase traffic to a company's website
- **Social Media Marketing:** Everything a business does via social media channels, such as Facebook, Instagram, TikTok, Twitter, LinkedIn, YouTube, Reddit, Pinterest, Quora, and so on
- **Content Marketing:** Blog posts, white papers, e-books, digital video, podcasts

- **Email Marketing:** Messaging directly to the Target Market, with the goal of high open and click-through rates
- **Mobile Marketing:** Reaching the Target Market on their smart phones or tablets using text messages, social media, websites, email, and mobile applications
- **Marketing Analytics:** Tracking Target Market behavior for all electronic marketing methods used, with the goal of ascertaining the number of times a link is clicked, time spent on a website, email open rate, email click-through rate, and purchasing history (to name a few)
- **Affiliate Marketing:** Use of industry experts and influencers to promote a company's products and services

Play #15. **Brand Awareness Strategies:**

- **Create a personality for your company.** Give your company a personality that's true to your brand and will resonate with your Target Market. This personality can be funny, witty, emotional, happy, smart, sentimental, or any other trait that you believe will be consistent with the personality of your company.
- **Communicate why people should do business with you.** Clearly communicate your Value Proposition, Unique Selling Proposition, Points of Differentiation, and Mission Statement.
- **Use Social Media Marketing.** Increase the volume of content that resonates with your Target Market on your social media platforms.

- **Create referral programs.** Provide current customers with an incentive to refer your products or services to their friends and family.
- **Create more video content.** Video marketing is a great way to tell your story and reinforce your company's personality.
- **Use non-Digital Marketing campaigns.** Where appropriate, use Traditional Marketing campaigns such as brochures, flyers, and advertising on vehicles, billboards, and/or posters.
- **Use consistent messaging.** It's vital that all the strategies you employ to increase brand awareness are consistent in content and timeliness. You should use consistent colors, fonts, personality, Tagline, and frequency of messaging.
- **Use high quality marketing materials and tools.** People judge you and your company in many ways, and the quality of your marketing and sales materials is one of them. Take the necessary time and money to produce the highest quality materials and tools that your budget allows. Brochures, applications, forms, websites, business cards (e-cards), and online administrative tools all portray your company and your culture.

Play #15. **Steps to Create Your Marketing Plan:**

1. Form a marketing team that will have the responsibility for creating your Marketing Plan. The task of creating your Marketing Plan should include all key personnel. By that I mean anyone in the company who is responsible for executing the promises made in your marketing messages. At a minimum, this includes you, your CEO or

- President (if applicable), outside consultants, and team members from marketing, sales, and customer service.
2. Using the Four Major Market Segments, define your Target Market, including individuals or companies who might be interested in your product or service. Be as specific as possible about your Target Market's characteristics and locations.
 3. List, in order of importance, the goals of the Marketing Plan. A few possibilities:
 - Create sales
 - Create brand awareness
 - Generate leads
 - Grow social media presence
 - Become a thought leader
 4. In as few words as possible, describe your product or service.
 5. Include your Value Proposition.
 6. Include your Unique Selling Proposition.
 7. Include your Differentiators.
 8. List your main competitors.
 9. Include your Sales Presentations and Elevator Pitch (see *Play #17. Your Presentations*).
 10. Determine your budget. How much do you plan to spend to execute the actions called for in the Marketing Plan?
 11. Describe your tracking and follow-up. How will you track the results? How will you follow up with interested prospects?

12. Describe the tactics and methods, including frequencies, that you will use to carry out your Marketing Plan. Here are some possibilities:

- Digital Marketing, such as: Search Engine Optimization, Pay-per-Click, Social Media Marketing, Content Marketing, Email Marketing, Mobile Marketing, and/or Marketing Analytics
- Face-to-face sales calls
- Personal referral email campaign (“Help me spread the word.”)
- Co-op marketing with non-competitors in the same Target Market
- Advertising in appropriate media
- Networking
- PR Campaign (see suggestion below for the book *Free PR*)
- Flyers or posters
- Customer referral program
- Newsletters
- Signage
- Articles in business magazines
- TV interviews
- Speaking engagements
- Sponsorships

Play #16. Eleven Necessary Components to Create a Structure for Sales Excellence:

1. **Corporate Culture of Sales.** It starts at the top and works its way through the entire company. Everyone in the company must understand that selling is everyone’s job.

Each team member needs to internalize the fact that *every action and communication by each team member influences the company's sales success*. Just about everything must go right for a sale to happen. One thing going wrong can derail the sale.

2. **Senior Level Involvement.** As stated above, it all starts at the top. I'm not just speaking about the senior team understanding that creating sales is everyone's job, but much more than that, they must be completely involved in the sales process.

Senior team members should:

- Review Key Performance Indicators for both Sales and Marketing on a regular basis. [For a list of Key Performance Indicators, see *Play #23. Operational Excellence (OE)*.]
- Continually review all marketing strategies and tactics and evaluate how efficiently prospects are moving through the Sales Funnel or the Customer Value Journey.
- Make frequent sales calls with the sales team (for companies with a field sales force).
- Be at the center of all key decisions regarding sales and the sales process.
- Lastly, but most importantly, *the senior team should be perceived as the champions of Sales Excellence*. There shouldn't be a thread of doubt in anyone's mind that the senior team understands the sales process and strategies thoroughly, believes in it totally, expects 100% compliance with it, and is expecting increased sales because of it.

3. **Discussions with Clients and Prospects.** It's imperative that everyone on the team listens to clients and prospects. Actually, don't *just* listen, have frequent in-person and online discussions with them. These discussions should achieve the following:
- Discovering client needs and how your products or services fit those needs.
 - Learning how to improve your products or services.
 - Uncovering negatives. Find out what your clients don't like about your product, service, operations, and customer service. Don't be afraid to hear negatives. In fact, encourage your clients to tell you all the bad things they can think of — and make sure you're taking notes. Many people shy away from hearing negatives, which means they miss out on a golden opportunity to get the most expert sales consulting possible.
 - Asking “what if” questions to test clients' reactions to proposed changes in operations, procedures, products, or prices.
4. **Customer Relationship Management System (CRM) or Donor Management System (DMS):** To achieve continued excellence and high sales results, a company must have a state-of-the-art CRM system (and a charity must have the same in a DMS).

Play #16. **Highlights of a Well-Designed CRM or DMS System:**

- **Customizable.** Allows customization to meet the specific needs of a company
- **Contact Management.** Ability to organize all clients, prospects, and contacts by specific criteria.

- **Workflow Automation.** Details all necessary actions from prospect identification to close of the sale.
- **Customer Service.** Tracks all interactions, activities, communications, and problem resolutions.
- **Activity Tracking.** Able to track employee activity and performance.
- **Reports and Dashboards.** Able to pull data from other software and create real-time reports.
- **Mobility.** The system can be accessed by smartphones.

CRM Systems

- HubSpot Sales
- Microsoft Dynamics 365 For Sales
- Salesforce Sales Cloud
- SAP Sales Cloud
- Zoho CRM

DMS Systems

- Bloomerang
- DonorPerfect
- DonorSnap
- Eleo
- Network for Good

5. **CRM Compliance.** Your CRM system will only be as good as the level of discipline with which it is employed and the quality and timeliness of information that it is populated with. Whether you are utilizing a Traditional, Digital, or Integrated Sales

Process, you should appoint a CRM Czar. This person's responsibilities are to ensure that your CRM system is performing up to the standards you've set, is delivering the information that you need, and that all teammates and other software are populating the system as required.

6. **Specific, Achievable Goals.** You should set and track specific Activity and Sales Results Goals for all your Traditional, Digital, or Integrated Sales activities. All these activities must be logged into the CRM system either electronically or by the person conducting the activity. Sales Results should be tracked by sales from both existing and new customers. Your Activity Goals and the Sales Results Goals will be used to judge the effectiveness of your salespeople and your Digital Marketing strategies, and they will drive your future sales and financial projections.
7. **Regular Review.** Your sales results, whether from Traditional, Digital, or Integrated strategies, will be directly proportional to the degree to which you review, analyze, modify, innovate, coach weaknesses, and reinforce strengths.

Regardless of whether you have a field salesforce or rely strictly on a Digital Sales strategy, I suggest that you start by reviewing the activities and results from the Digital Sales efforts. You should start there because you first want to find out if those efforts are achieving their primary goal of populating your Customer Value Journey and/or your Sales Funnel.
8. **Right People on the Team.** If you hire the right people in the first place, you'll save yourself a lot of work and achieve far superior sales results. In my opinion, companies often waste time trying to get world-class sales results from team members who don't possess the necessary knowledge, skills, and/or desire. When we talk about

the *right people on your team*, we are not speaking just about your full-time team members but also any outside consultants, especially those who will be responsible for your Digital Marketing strategies.

9. **Right Players in the Right Positions.** By this, I mean that you align your Best People with the Best Products to focus their efforts in your Best Target Markets. Just as in sports, you want to have the right people in the right positions where they can score. There's nothing fair about some people being more talented, smarter, and harder working than others, but that's the way it is. Don't fall into a guilt trap where you think you must give everyone an equal opportunity. When you do that, you are likely to end up assigning a less talented person to one of your best product lines or a territory with the highest potential. Your job, as the leader, is to have the team score (sell) as often as possible. Increase the odds in your favor by putting your best people where they can sell as much as possible.

10. **Mindset of: Build Relationships. Don't Sell Products.** People choose to buy from a particular person or company for the same basic reason: *TRUST*. They trust that they will receive the value that you're promising to deliver to them at a competitive price. This trust allows them to enter into a relationship with your company and your team — and building relationships is a far better long-term strategy than just trying to sell products.

If you desire long-term success in any business, you need to figure out how to keep your business from becoming commoditized. Price is always important, but to achieve long-term success, you should think of price as secondary to the value your product or service offers. The primary focus should be your relationship with the

client. One of the best ways to achieve this relationship and not have your business be commoditized is by spending extra time learning about your client, on both a business and personal level. Find out what clients really want from the people they do business with. Also, let them know about your company's beliefs, culture, and what's important to you. People want to buy from people they like and trust.

11. Consistent Referral Program. Asking for referrals is one of the easiest and cheapest ways to market your company and grow your business — and it amazes me how many times people fail to ask! Every time you and anyone in your company interact personally or electronically with a client, prospect, business associate, or friend, you should use that interaction to look for an opportunity to ask for a referral. I say that you should be *looking for an opportunity* because obviously there are times when asking for a referral is not appropriate. A few examples:

- A client has a problem that you're still working to resolve
- You have a brand-new client to whom you haven't yet proven yourself
- The client has recently given you a referral

Play #17. **Your Presentations**

Keys to Creating and Delivering an Effective Sales Presentation

1. **Prospect's Motivators.** Before you start to create your presentation, you need to understand what will motivate your prospect to buy.
2. **Objective.** Know what you want to accomplish with your presentation. For instance, are you trying to accomplish one or more of the following: introduce your company

- and services; learn more about the prospect; move the prospect to the next step; make a sale?
3. **Theme of Presentation.** Develop a presentation that both speaks to the prospect's motivators and satisfies your objectives.
 4. **Storytelling.** Your audience will become more engaged if you tell a story instead of reciting a script. Tell your story from the prospect's point of view.
 5. **Decision Makers Present.** Try to have all the individuals involved in the decision present.
 6. **Time and Tools.** Prepare your presentation and the devices to be used to fit the venue, audience, and time allotted.
 7. **Break the Ice and be Confident.** Introductions, short story, or a joke. But stay within yourself; don't try to be someone you're not.
 8. **Open Strong.** Start with a powerful statement or slide. Try to rock your audience right off the bat. Invite participation and questions, which encourages attentiveness.
 9. **Value Proposition and Points of Differentiation.** Use your Value Proposition and Points of Differentiation to show the prospect why they would want to consider doing business with you.
 10. **Listen Well and Ask Questions.** Listen well to what is said and what is not said, and engage the audience early and often by asking questions.
 11. **Clear and Understandable Communication.** Use words that your audience will understand. Stay away from acronyms.
 12. **Proof Sources.** Have examples of proof sources that demonstrate your successes.
 13. **Do a Replay.** Review what you have told your audience.

14. **Call to Action.** What do you want to happen next? Have a clear Call to Action.

15. **Verbal Summary.** Before the meeting adjourns, summarize your understanding of what was covered and the agreed-upon action items, especially the deliverables.

16. **Practice—Practice—Practice**

Create a Video

Here are a few tips to make the process go a little smoother:

- Write the script using word processing software such as Word.
- Read the script aloud to yourself.
- Remember that what sounds good in your head is always different when you hear it in your ears.
- As you are reading the script, time yourself. Most experts will tell you the shorter, the better. I think that 90 seconds is just about right.
- Once you have the script you want, read it to a few other people to get their opinion.
- Hire a videographer.
- Practice—Practice—Practice. As you practice, work on your inflection. You don't have to memorize the script because it will be on a teleprompter.
- On the day of the shoot, just relax and read the script off the teleprompter.

Play #18. Test Marketing

Play #19. Second Financial Forecast and Executive Summary

Play #20. Viability Presentation

Guidelines for Creating Your Viability Presentation

The following guidelines will help you create your Viability Presentation.

- The outline and order of the presentation could look something like this:
 - Introduction: Why we are here
 - Description of the Idea
 - Company Name, Logo, and Tagline
 - Value Proposition, Unique Selling Proposition, and Mission Statement
 - Organization Chart
 - Market Research: Marketplace, Competition, Customer Value Journey, and Test Marketing Results
 - Points of Differentiation
 - Competitive Advantages
 - Marketing Plan
 - Website Demo (with Video)
 - Marketing Materials: brochure, flyers, business cards, and so on
 - All Sales Presentations (from *Play #17. Your Presentations*)
 - NIFT Forecast Review and Funding Requirements
 - Summary

- Produce the presentation using PowerPoint or other similar software (Canva, Prezi, and so on).
- The presentation needs to be professional and “ready for prime time.” You want the audience to be wowed by the quality of the presentation, your website, materials, and how prepared you are. The sole purpose of the presentation is to solicit reaction and see if you have a viable idea. ***Remember, no matter what they say, what you really want to know is WHY they think that.***

Guidelines for Delivering Your Viability Presentation

Once you’ve created your Viability Presentation, the following guidelines will help you with the presentation.

- **Decide on a venue for the meeting(s).** It’s great if you can get everyone in the same room, but if that’s not feasible, you may have to use an electronic meeting or combine a face-to-face meeting with an online meeting.
- **Limit attendees.** Yes, you want as much input as possible, but you also need to control the meeting. Ideally, limit each meeting to four to six people. It’s fine to have multiple meetings. In fact, having a series of meetings will allow you to use input from previous meeting(s) to better prepare for the next one.
- **Consider having everyone in the room at once, if possible.** The above being said regarding four to six people in the meeting, it can be advantageous to have all parties in the room at the same time, so you can hear and see their interactions, as well as assess their reactions to each other’s opinions. In this way, you’ll get a more balanced assessment of their opinions about your chances for success and the obstacles you’ll

face. As mentioned above, the caveat is that a larger group might limit your ability to control the meeting.

- **Start reaching out to as many qualified “Coaches” as you know.** Ask them if they’d be willing to sit through a three-hour Viability Presentation for your new business. Explain that you’re not asking them to invest but simply would very much appreciate their input.
- **Coaches do not necessarily have to possess intimate knowledge about the specific industry.** It’s great if you can have individuals who have specific knowledge regarding your industry; however, more importantly, you’re looking for experienced, intelligent businesspeople (preferably entrepreneurs) who will give you objective feedback and ask insightful questions.
- **Send invitees any marketing materials and ask them to tour your website prior to the meeting.** In this way, they’ll have an overview of the subject matter you’ll be presenting.
- **At the meeting, remember that the primary questions to be discussed are:**
 - Is my idea for the product or service something that my Target Market will buy?
 - Are my assumptions reasonable and realistic?
 - What changes are necessary?
 - Do I have a reasonable chance of success?
 - Do I have sufficient capital to get to my breakeven point?

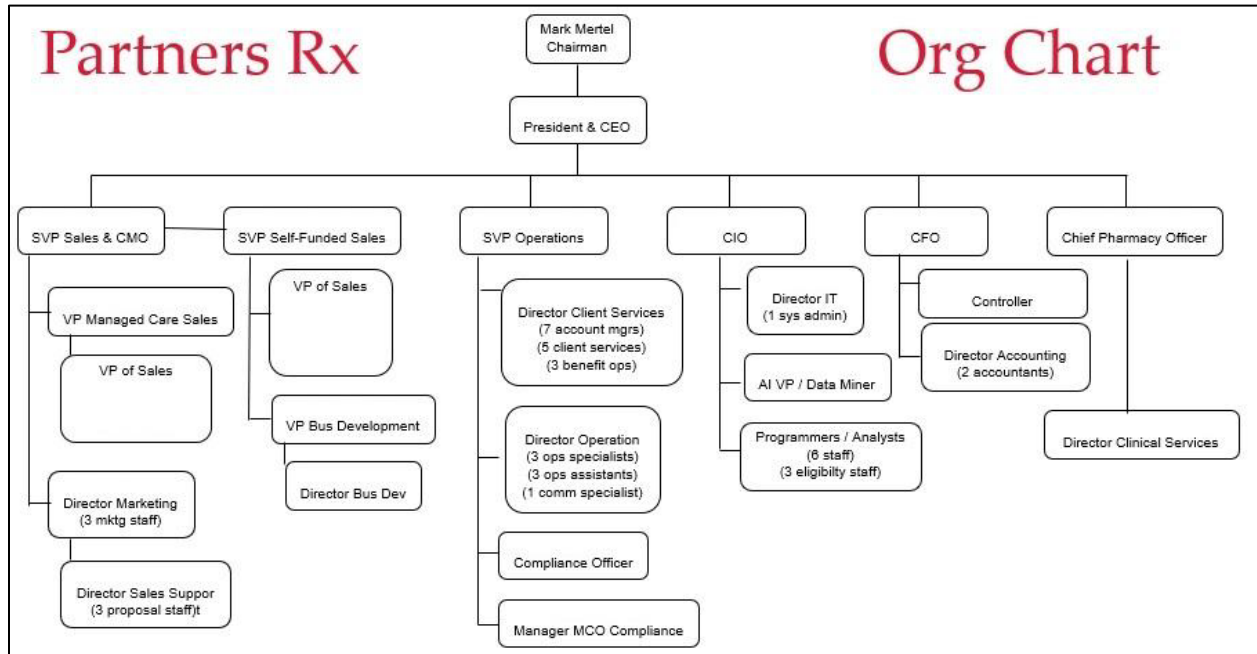
Play #21. Building A Great Team

The first step to building a great overall team is to build a great management team. Once you've assembled your management team, you can charge them with the responsibility of filling their rosters with the best possible candidates. Because this subject is so important, we'll spend a good deal of time discussing how to go about it.

Creating an Organization Chart

You should begin building your management team by first deciding what positions and disciplines you need to fill on your startup team. You do that by creating an Organization Chart, detailing each position you'll need on Launch Day, the responsibilities for that position, and the experience, knowledge and expertise required. Remember that during this startup phase, it's common for a team member to wear more than one hat (i.e., job description) and some of the positions may be filled by outside independent contractors. As you grow and the volume of activities increases along with revenue, you will bring on additional team members.

Below is a sample Organization Chart.



Here are the responsibilities for some of titles used above:

- **Chairman:** Heads up the Board of Directors and has the ultimate responsibility for all activities of the company.
- **CEO (Chief Executive Officer) or President:** All activities of the company, including earnings. Reports to either the Chairman or the Board of Directors.
- **COO (Chief Operating Officer):** Planning, organizing, and controlling all of the day-to-day operational activities of the company.
- **CFO (Chief Financial Officer):** Financial forecasting, reporting, and accounting functions.
- **CIO (Chief Information Officer):** Management and implementation of information and computer technologies.
- **VP Marketing:** Development and implementation of marketing strategies in support of the sales strategy.

- VP Engineering: Product development and technical expertise.
- VP IT (Information Technology): Use of IT technologies to support all operations of the company.
- VP Sales: Development, training, and implementation of sales strategies.

Guidelines for Filling Positions

Once you've created your Organization Chart, you're ready to start filling those positions. But before you start that process, here are a few things to keep in mind.

- **Hire talented people who are smarter and better at their jobs than you.** This is where you leave your ego outside the door. You want to surround yourself with people who are personable, scary smart, and talented. Sure, experience is important, but don't make the mistake of passing on a smart person with little or no experience. Remember, smart people learn fast. You want people on your team who will be able to run the company in a few years.

Any coach, in any sport, will tell you that you can only be a great coach if you have great players. Your ability to execute is limited to the level of talent on the team. Can you (and your ego) deal, on a daily basis, with all these smart and talented people? If you really want to have the best possible company, search out and welcome these people. I can tell you from personal experience, it's exciting and fun to work with smart people who get it and can execute your plays at a high level.

- **Hire People You Like.** Just because a candidate fits most of your criteria for the position, that doesn't necessarily mean they will be a good fit on your team. Besides having most of the attributes you're looking for, you have to like them. That's right, if you want it to work out in the long run, you must like them. If you don't like them,

more than likely, the rest of the team and your customers will feel the same. There's no formula for this decision. It's all about what your gut is telling you.

- **Create Workplace and Team Diversity.** A diverse workplace and team welcome and include team members of all backgrounds (gender, race, age, physical ability, religious beliefs, sexual orientation, and so forth). A diverse workplace does not mean accepting individuals who aren't capable of performing up to the standards and expectations of the organization, but it does involve actively recruiting qualified candidates from a wide variety of backgrounds. Creating a diverse workplace and team increases:
 - Productivity
 - Creativity
 - Skills
 - Knowledge
 - Problem solving abilities
 - Cultural awareness
 - Team spirit
 - Company reputation
 - Ability to attract additional talented employees
 - Marketing and sales opportunities

Guidelines for Finding Qualified Candidates

The above guidelines might seem daunting, but talented, qualified people *are* out there.

Here are a few suggestions for finding them:

- Expand your search beyond your immediate geographical area
- Visit competitors' businesses
- Employ job posting sites such as Indeed, ZipRecruiter, CareerBuilder, and [LinkedIn](#)
- Use social networks like [Facebook](#) and [Twitter](#)
- Host an open house recruiting party
- Ask for referrals from friends, colleagues, and customers
- Use recruiters and employment agencies

Management Team Key Attributes

Look for management team members who possess:

- Ability to be Results Oriented
- Ability to Lead and Coach
- Ability to Succeed
- Coachability (Will take instructions)
- Communication Skills
- Confidence
- Courageousness (Makes Tough Decisions)
- Cultural Fit
- Discipline
- Emotional Intelligence (Sensitivity and Empathy)
- Energy
- High Intelligence (IQ)
- Integrity
- Likeability

- Organizational Skills
- Positive Appearance (Looks the Part)
- Positive Attitude
- Preparedness
- Reliability
- Self-Awareness
- Sociability
- Willingness to Delegate (Not Micromanage)
- Work Ethic

Interview Questions

1. About our company:

- Can you tell me what we do here at ABC Inc?
- Describe the duties of the position you're applying for.

2. About the candidate's current job and work experience:

- What experience have you had that prepared you for this opportunity?
- What is your current position and its related responsibilities?
- Why do you want to leave your current job?
- What could your current company do to be a better place to work?
- What could your present company do to be more successful?

3. About the candidate's skills:

- What skills and strengths do you have that will help you succeed in this position?
- What is your greatest accomplishment?
- What was your greatest failure and why did it occur?

- What are your greatest strengths and weaknesses?
- How can you reduce your weaknesses?

4. About the candidate's work style:

- Describe a significant challenge that you have overcome recently.
- How would your present coworkers describe you?
- How would your current boss describe you?
- Do you work best on your own or as part of a team?
- What does this quote mean to you? "Leave your ego at the door."
- How would you describe your work ethic?
- How would your peers rate your reliability?
- How do you handle quota and deadline pressures?

5. Getting to know the candidate:

- Tell me about your education and training.
- Tell me a little about yourself.
- What's more important to you, what you say or what you hear?
- Outside of business activities, what do you participate in?
- What motivates you?
- What discourages you?
- How do you define success?

6. About the candidate's leadership abilities:

- How would you describe your leadership style?
- Are you a great leader or a good leader? Why?
- How do you go about leading and coaching your team?

- How would you interact with a direct report of yours who was failing?

7. About the candidate's organizational skills:

- How do you go about organizing, prioritizing, and delegating your workload?
- Do you tend to delegate and coach, or do you jump in and get things done yourself?
- How would you rate your level of organization?
- Do you use a Task Management System? Please describe it.

8. About handling conflict:

- How do you handle disagreements with your present boss?
- How do you handle difficult customers?
- Who is your toughest critic? Why?
- Do you consider yourself a disciplined person? Please give me some examples.
- How would you react if I disagreed with how you handled a situation?
- How coachable are you?
- Can you describe a situation in which you would *not* be coachable?
- What steps do you take when solving a problem?

9. About what makes the candidate unique:

- What are you passionate about?
- What qualifications can you bring to this opportunity that others can't?

10. About the candidate's vision for the future:

- If you're the successful candidate, what would you do in your first week on the job?
- How do you continue to improve your knowledge and skills?

- What do you want to accomplish in the next five years?

11. Wrap-up:

- What questions do you have for me?
- Is there anything else you'd like to mention that we haven't covered?

Play #22. Creating a Culture of Excellence

Guidelines Defining Your Core Values and Statement of Culture

- **Create a list of topics that define your company's Core Values.** Potential topics include:
 - Being a team player
 - Treating fellow employees respectfully
 - Having a positive attitude
 - Maintaining service excellence
 - Valuing new ideas
 - Emphasizing organizational excellence
 - For management:
 - Hiring only great people
 - Empowering people
 - Emphasize that teams win, not individuals
- **Create a "Statement of Our Culture" document.** This document will become your company's standard for how each team member will go about their business, every day.

- **Continually communicate your Culture of Excellence (CE) to your entire team.**
Display your “Statement of Our Culture” document throughout the workplace.
- **Delegate to team managers the responsibility of auditing various aspects of the CE policy.** This will help you and your team determine if it’s becoming a part of your culture. As the leader, you should do CE Walk Arounds to show the employees that you care about the company’s culture and to see for yourself if the CE policy is being practiced.
- **Institute an open-door policy between yourself and your managers.** Encourage them to talk with you about any questions or concerns. The key to a successful open-door policy is trust. Managers need to feel totally confident that they can come to you about any subject whatsoever, with absolute assurance that the conversation will be held in confidence. If any action is dictated from these conversations, every attempt possible will be made to keep the source of the information confidential. This policy works both ways, with you walking into their office and asking them how things are going or what their opinion is on a particular subject. In fact, that’s an excellent way to get that open door swinging freely.
- **Ensure that the open-door policy is instituted by your managers.** They should use this policy with members of their respective teams.

A Sample Core Value Statement

A Statement of Our Culture: DHS CREATES VALUE

- **D**evelop a Great Team. Strive to be a great team member; in business, individuals do not win, great teams do.

- **H**ire and Retain Great People. Hire only the best people; create opportunity and a culture for their long-term success and fulfillment.
- **S**ervice Excellence. Listen well and see their side, communicate their importance to us, fix the problem, find the root cause, and fix it.
- **C**reate a Sense of Purpose. Ensure that each team member understands our vision and goals, how they contribute to our success, and what it means to each of them.
- **R**emain Positive. Maintain a positive attitude to enable you and the team to operate at the highest possible level.
- **E**mpower People. Delegate the responsibility and power to act; trust in our team members' abilities to succeed.
- **A**dhere to the Golden Rule. Treat all people like we want to be treated, with honesty and empathy.
- **T**rain and Educate. Educate team members thoroughly regarding our business strategies and the specifics of their job.
- **E**xcellent Organization. Become organizationally excellent; it allows you to perform at your highest level with the lowest level of stress.
- **S**elling is Everyone's Job. Realize that every action and communication influence our reputation and success.
- **V**alue New Ideas. Continue to innovate to solve tomorrow's challenges by thinking outside the box, welcoming new ideas, and being adaptable to change.

- **A**ctions Speak Louder Than Words. Always walk the talk; be professional in every aspect of your work and align every action with our core values.
- **L**augh. Enjoy the moment; appreciate the journey, not just the destination. Put some fun into our work!
- **U** Do Make a Difference. Strive to make a difference in our business and the lives of people who we touch.
- **E**ffective Communication. Communicate clearly, completely, timely, frequently, and professionally.

Play #23. **Operational Excellence (OE)**

Some Key Performance Indicators

Here are some Key Performance Indicator categories to consider:

- **Culture:** Employee satisfaction, training completed, corporate culture, team spirit, and employee retention
- **Customer Satisfaction:** Net Promoter Score, CSAT Score, Interactions, Response Rate, Total Resolutions, First Contact Resolutions
- **Exceptional Individual Execution:** Organizational Excellence, Task Management Utilization, Customer Relationship Management
- **Information Technology:** Uptime, application performance and availability, employee and customer satisfaction, website visits, and Search Engine Optimization
- **Marketing:** Leads generated, Digital Marketing ROI, customer acquisition cost, email marketing results

- **Monthly Financials:** Net income, available cash, projected net income, projected cash (the Net Income Forecasting Tool [NIFT] will track these)
- **Monthly Sales Efficiency:** Total sales, sales calls, presentations, win-loss ratio, referrals, social media contacts, and repeat sales
- **Productivity:** Capacity efficiency, downtime, overall equipment effectiveness, output, operational issues, and labor utilization
- **Quality:** Product error/defect, order accuracy, and rejected order

Guidelines for Developing an Operational Excellence Plan

- **Involve management.** Meet with your management team to determine what Key Performance Indicators (KPIs) you're going to track. At this meeting, explain the purpose of the Operational Excellence Plan and what it will mean to the company. To help you decide which Key Performance Indicators you want to track, revisit your company's purpose and goals by reviewing your Value Proposition, Unique Selling Proposition, Mission Statement, and Net Income Forecasting Tool. After all, the purpose of your Operational Excellence Plan is to help you achieve your purpose and goals.
- **Create an Operational Excellence Team.** Identify a smaller team who will oversee the development and management of the Operational Excellence Plan.
- **Create one or more systems to track all KPI metrics.** To the extent possible, these systems should be available to all employees on a real time basis. This will allow team members to take immediate corrective action when appropriate.

- **Analyze your current state of Operational Excellence.** You do this by compiling the initial baseline of metrics for all KPIs. This will be your benchmark for improvement.
- **Identify the critical KPIs.** These are KPIs that have the highest potential to impact your success.
- **Develop your plan.** Develop your strategies and tactics to improve all KPIs, with emphasis on the KPIs you identified above.
- **Communicate the Plan.** Clearly communicate the Operational Excellence Plan to all team members, detailing each person's responsibilities. It's important that each team member knows exactly what their responsibilities and performance expectations are for helping the company meet the Operational Excellence Plan's goals.
- **Track Operational Excellence.** Produce routine and timely reports for all KPI metrics and share the results with all team members. The timeliness of these reports is critical to achieving and maintaining OE. The frequency of audits will be directly proportional to the volume of transactions your business produces. For instance, a company that sells 100 products a day online may want to conduct a performance audit on a weekly basis, whereas a company that has just one transaction a day may only need to conduct audits monthly.
- **Correct immediately.** Take immediate corrective action for any KPIs that aren't meeting set standards. If possible, for any problem that has negatively affected a customer, directly interact with the customer. Next, find the root cause of the problem and fix that.

- **Meet regularly.** On a regular basis, meet with team members who are responsible for KPIs. Use this meeting to develop improvement strategies for all KPIs.

Play #24. World Class Customer Service (WCCS)

Nine Keys to Achieving World Class Customer Service

1. **Remember that WCCS starts at the top, with you.** Your company exists because of your customers, and everyone in the company works for them. Your message to your team should be clear and consistent: your company will do everything in its power, and then some, to make the customer feel happy and appreciated.
2. **Create a simple customer satisfaction survey.** Use it to periodically query customers, asking them to rate your company, products, services, and customer service, and give suggestions for how you can improve. (See *Measuring Customer Satisfaction*, later in this Play.)
3. **Hire the best possible people you can find.** Hire happy people who you like and who like other people. Give your employees the authority and the resources they need to do whatever is necessary to make the customer happy. Make sure they know how to go above and beyond to wow clients.
4. **Know the personalities of your team members.** Team members who are people-oriented should be forward facing and have the most engagement with customers.
5. **Build a company that has Operational Excellence, with a goal that 98%+ of the time, the customer experience is perfect.** This frees your Customer Service personnel to focus on the few people who have a less-than-great experience.

- Whatever the problem, the goal is to fix it fast, fix it right, and spend a little extra time and/or money to wow the customer.
6. **Don't run away from customers with problems.** Rather, embrace the situation for what it really is: problem situations are among the best opportunities to differentiate your company from the competition by showing the customer what World Class Customer Service is all about. Demonstrate sincere empathy for the customer, immediately fix the problem, and then go above and beyond what you already did to blow their mind with a gesture of over-the-top customer service.
 7. **After you have fixed the problem and delivered your World Class Customer Service, find the root cause for the problem.** Then immediately fix it, so the problem does not reoccur.
 8. **Thank your customers for their business every chance you get.** Find unique ways to tell them how much you appreciate them. Simple gestures like a personal note thanking them for their business, some flowers, or even fruit or candy, will go a long way. With service like that, you will have a client for life and more referrals than you can handle.
 9. **Reward employees who practice WCCS.** On a regular basis, have public reward ceremonies for the people in your company who have delivered the best Customer Service.

Measuring Customer Satisfaction

The most popular method of measuring overall customer satisfaction, which is also the simplest, is called Net Promoter Score.

The question for NPS is usually worded something like, “On a scale from 0 to 10, how likely are you to recommend our company, product, or service to a friend or colleague?”

NPS scores are divided into Passives, Detractors, and Promoters:

- **Passives:** Non-responders.
- **Detractors (scores 0 — 6):** People who are unlikely to recommend a company or product, probably won't buy again, and worst of all, may actively discourage others from buying.
- **Promoters (scores 7 — 10):** Loyal customers who will repeatedly buy and will actively recommend the company or product to others.

Your overall Net Promoter Score is calculated by subtracting the percentage of Detractors from the percentage of Promoters. The percentage of Passives is not used in the calculation.

For example, if you surveyed 100 customers, and you had 20 Passives, 10 Detractors, and 70 Promoters, your overall NPS rating would be calculated as follows: $(100-20) = 80$ respondents; $(80-10) = 70$ as an overall NPS rating.

So, what's a good NPS rating? It depends. Here is a 10,000-foot view of ratings and how most NPS experts would categorize them.

- -100 — 0: Needs Complete Overhaul
- 1 — 30: Good
- 31 — 70: Great
- 71 — 100: Excellent

Here is a list of various industries with their average NPS scores:

- Airlines: 49 — 53
- Auto Insurance: 39 — 43

- Banking: 32 — 36
- Cell Phone Service: 32 — 36
- Cell Phones Sales: 41 — 45
- Cloud Hosting: 43 — 47
- Communications and Media: 22 — 26
- Computers Sales: 41 — 45
- Construction: 50 — 54
- Consulting: 60 — 64
- Credit Cards: 41 — 45
- Digital Marketing: 55 — 59
- E-commerce: 43 — 47
- Higher Education: 52 — 56
- Financial Planning/Investments: 50 — 54
- Health Insurance: 25 — 29
- Healthcare Providers: 36 — 40
- Home Insurance: 32 — 36
- Hotels: 47 — 51
- Internet Providers: -5 — -1
- Life Insurance Sales: 33 — 37
- Online Entertainment: 40 — 44
- Online Shopping: 38 — 42
- Pharmacies: 30 — 34
- Retail Sales: 42 — 46

- Ride Share and Food Delivery: 44 — 48
- Satellite / Cable TV Services: -4 — 0
- Shipping: 25 — 29
- Software and Applications: 28 — 32
- Specialty Stores: 54 — 58
- Supermarkets: 34 — 38
- Technology Services: 37 — 41
- Travel Information Websites: 28 — 32

Another method to measure customer satisfaction is called a Composite Customer Satisfaction Score, or CSAT. (I know, it should be CCSS, but the acronym used is CSAT.)

Generally, this rating is on a 5-point scale:

1. Extremely Dissatisfied
2. Somewhat Dissatisfied
3. Neither Satisfied nor Dissatisfied
4. Somewhat Satisfied
5. Extremely Satisfied

Your CSAT score ranges from 0 — 100. To calculate your score, take the number of satisfied customers (those who rated you a 4 or 5), and divide by the total number of responses. For example, if 85 of your 100 responses have a rating of 4 or 5, your score would be 85%.

A CSAT score of 80% is generally considered a good indicator of a satisfied customer base, although it will vary by industry.

Play #25. **Exceptional Individual Execution (EIE)**

The TRRAFT Technique

The way you achieve Organizational Excellence is simple: you remove **Clutter**. The system used to remove Clutter is called **TRRAFT**. This is an acronym for **Toss, Refer, Act, File, or Task**.

Here's how it works. For each item, do one of the following:

- **TOSS.** *Business Week* says, “Man’s best friend, aside from the dog, is the wastebasket.” This includes both the physical wastebasket next to your desk and the electronic one in your computer or smart phone. If you hate to toss papers in the wastebasket or delete electronic communications and files, ask yourself, “What’s the worst thing that could happen if I tossed this out or deleted it?” That being said, don’t agonize over the question. If in doubt, file it in a physical or electronic file; if future action is required, note that on your Task Tracking System (which we’ll cover later).
- **REFER.** This means assigning someone else the responsibility of performing the necessary action required because of a communication or situation that you have. When you assign something, be cognizant of the assignee’s ability, knowledge, and expertise to complete the assignment. Some things can be handled simply, as with a note on a forwarded email. If follow-up is necessary, make a note in your Task Tracking System, or leave it flagged in your email’s Sent folder.
- **ACT.** If you can, act on it *now*. It’s always more efficient to handle a piece of paper or an electronic communication only once. If you can’t act on it now, then attach a note describing the required action and put it into the proper physical or electronic file

of your Task Tracking System, such as Reading, Action, or Projects. (Again, we'll cover this below).

- **FILE.** Most of your communication will be electronic, so you'll need to create various electronic folders and save your communications into them.
- **TASK.** When you task something, you add it to your task list or assign it to another person's task list. Within the task, create an alarm for some future date or time when the task must be completed. Microsoft Outlook's Task software is an excellent tool for this purpose. There are also task applications like Monday.com and Asana that are great.

Seven Main Areas On Your Computer

If you want to achieve OrgEx, there are seven main areas on your computer that you should deal with: Desktop, Inbox, Sent, Deleted, Documents, Calendar, and Tasks. Let's look at each area and examine what needs to be done.

- **Desktop.** Your objective is to have a minimum number of files on your Desktop at any one time. If your Desktop is totally cluttered with files, it's extremely hard to locate the one you want, and it causes clutter in your mind. It's okay to keep files on your Desktop that you're currently working on, but if you haven't used a file in a few days, you may want to place it into its proper spot in Documents. Your Desktop should be free of all nonessential files.
- **Inbox.** Create folders in your Inbox to file emails that you want to keep and be able to locate easily. Create as many main email folders as you think you need, then create sub-folders under them. For example:

- Customer Service
- Finance
- HR
- Insurance
- Legal
- Personnel
- Sales
- Taxes

At least once per day (preferably more), go through your Inbox, TRAFtting as necessary. At any time, your Inbox should have no more than one week's worth of emails in it. If you've replied to an email, it now resides in your Sent folder, so delete it from your Inbox. The ideal is that at the end of your workday, you have no emails in your Inbox because you've acted on all of them. If this is not possible, TRAFt your emails early the next morning.

- **Sent.** At least once per day (preferably more), go through your Sent box and delete all the sent emails you no longer need, then file those you wish to keep in the appropriate Inbox sub-folder. Or, if you need to follow up on an email, flag it and leave it in your Sent box. By performing a simple search, you'll be able to find any email quickly. There should be nothing in your Sent box more than two weeks old, unless there's a specific date by which you expect a response, and you've already placed a flag on it.
- **Deleted.** Once a month, go through your Deleted box and remove anything more than a month old. If you haven't needed it in month, chances are great that you'll never need it.

- **Documents.** Go to the Documents section and create folders for all the documents you wish to keep. Your Document folders can be created in similar fashion to your Inbox folders. After your work on a document is finished, place it in the appropriate Documents folder.
- **Calendar.** Use your calendar for *all* business *and* personal appointments and events that you want to remember (even things like birthdays). Although you might not like to think of it this way, you truly don't have separate business and personal lives — at least, not when it comes to scheduling. You have one life that consists of both business and personal responsibilities. If you use one calendar for everything, both personal and business, your life will run much more smoothly. Get your calendar up to date and keep it that way.

Seven Keys for Excellent Organization

The following seven keys summarize the Organizational Excellence suggestions we've discussed in this Play.

1. Use **TRAFT**: **T**oss, **R**efer, **A**ct, **F**ile, **T**ask. If you haven't used something (file, reference manual, report, book, article) in the past three months, you probably don't need it at all, and you certainly don't need it cluttering your work area. Throw it out, create a file, or find a different storage area for it.
2. Keep your work surface totally clear, except for necessary work tools and the project that you're currently working on.
3. Use a calendar with both business and personal commitments on it.

4. Create a Task List. Items should be listed with a clear but succinct description of the item and necessary action. Use these tips for your Task List:
 - Print your Task List and have it on your smart phone so you can refer to it and make notes and updates.
 - Daily, prioritize your Top Five Tasks. If necessary, check with teammates to ensure that everyone agrees on today's priorities.
 - Review your Task List as often as possible, but at a minimum once a day to update and reprioritize.
 - Place both business and personal items on your Task List.
5. Deal with all electronic communications and paper once (or, at most, twice). After you decide to act on any communication or task, immediately do it. Then perform the necessary TRAFt (Toss, Refer, Act, File, Task).
6. Whenever you need to get back on track, call a timeout. Give yourself enough time to TRAFt everything and get a fresh start.
7. Do it *now!* Not later, not tomorrow. Every day, every time you receive an e-mail, touch a piece of paper, talk to a client, work on a project, or do anything that requires you to TRAFt, *take action immediately*. Discipline yourself to stay organized and on top of things — one Task at a time.

Play #26. Third Financial Forecast and Executive Summary

Play #27. X's and O's (Details, Details, Details)

X's and O's Checklist

1. Choose a Company Name and register it at your state's corporation commission website.
2. Hire a lawyer. Meet with the lawyer to discuss your plans and what needs to be done legally, such as:
 - a. Deciding on the form of business you will operate (LLC, C-Corp, S-Corp, 501(c)(3).
 - b. Decide what state you are going to incorporate in.
 - c. Draft the articles of incorporation and file with the state.
 - d. Register your Company Name with the state.
 - e. Register or reserve state or federal trademark(s).
 - f. Register copyright(s).
 - g. Apply for patent(s), if necessary.
 - h. Publish all required notices.
 - i. Apply for a Federal Employer Identification Number (EIN).
 - j. Apply for a Sales Tax number.
 - k. Create Employment Agreements.
 - l. Create client contracts.
 - m. Review any leases.
 - n. Apply for necessary licenses and permits.
3. Open a bank account and get credit cards.
4. Decide how to handle IT requirements.

- a. Choose a website host.
 - b. Create a website, as described in *Play #13. Your Company Website*.
 - c. Register your domain name.
 - d. Obtain company email addresses.
 - e. Create a company voicemail recording.
5. Produce printed materials and email signatures, as described in *Play #14. Email, Brochure, Business Cards, Letterhead, and Note Cards*.
 6. Hire an accountant.
 7. Secure a facility, equipment, and supplies.
 8. Obtain necessary insurance, including Workers' Compensation.

Play #28. Writing Your Gameplan: Putting it All Together

At a minimum, the Gameplan should include the following:

1. Executive Summary. In two pages or less, the Executive Summary tells your entire story. The goal is to grab the reader's interest immediately, so they'll read on. Start with a description of your product or service. Include a description of the Customer Value Journey and how your customer will travel from discovery to buying and then ultimately to becoming an advocate. As concisely as possible, explain why you believe your business will be successful.
2. Organization Chart
3. Points of Differentiation from the competition
4. Competitive Advantages
5. Value Proposition

6. Unique Selling Proposition
7. Mission Statement
8. Core Values
9. Financial Projections for the first three years, including sales projections and pricing
(if needed, the EGG NIFT software is available for this exercise)
10. Key Performance Indicators you will track
11. Marketing Plan and strategies
12. Sales Plan and strategies
13. Target Market
14. SWOT Analysis
15. Calendar for timing and tasks prior to Launch
16. Copyright or patent possibilities

Play #29. Installing Your Gameplan

Installing the Gameplan, a Presentation

1. Update *Play #20. Viability Presentation* with any new information and anything you have gathered to this point. Then use that update as the initial draft for your Installing the Gameplan presentation. Here is an outline for your Gameplan Presentation and meeting.
 - Introduction: Why we are here
 - Description of the Idea
 - Company Name, Logo, and Tagline
 - Value Proposition, Unique Selling Proposition, and Mission Statement

- Organization Chart
 - Market Research: Marketplace, Competition, Customer Value Journey, Test Marketing Results, and NIFT analysis
 - Points of Differentiation
 - Competitive Advantages
 - Marketing Plan
 - Website Demo (with Video)
 - Marketing Materials: brochure, flyers, business cards, and so on
 - Full Sales Presentation (from *Play #17. Your Presentations*)
 - NIFT Forecast Review and Funding Requirements
 - Summary
2. Schedule a meeting with your management team to go through the updated Viability Presentation.
 3. Send a copy of the formal Gameplan to each team member who will be attending. Instruct them to read it thoroughly and write down any questions.
 4. Hold the meeting and go through the Gameplan Presentation. The purpose of this presentation will be a bit different from the original Viability Presentation purpose. In this meeting, you want to bring your team up to speed about where you are in the development of your original idea, get their input on any refinement needed, perform another SWOT analysis (as you did in *Play #10. Initial Research*), and most importantly get their buy-in.
 5. Review each Play and create a Master Task List of all the tasks that need to be completed prior to your launch, listing them by priority and with timing requirements.

- In determining the order of Plays to work on, remember that certain Plays allow you to execute others. For example, as pointed out earlier, if you don't have Operational Excellence, it's just about impossible to achieve World Class Customer Service, and without Organizational Excellence, you won't achieve Operational Excellence.
6. Schedule smaller team "Think Tank" meetings with team members who will have direct responsibility for specific Tasks on your Master List. In these meetings, reach a consensus about the best way for the team to fulfill the requirements of each Task, then create execution plans. I realize that some of these activities will have already been completed when you did the various exercises. However, you should review each Play and decide if more discussion or activity is needed. At the conclusion of these "Think Tank" sessions, you will have created your Master Task list, covering each Play and assigning each to specific management team member(s), with a due date.
 7. Instruct all team leaders to conduct meetings with their teams to explain each Play in the Gameplan and ensure that team members understand your overall Gameplan and their specific responsibilities for each Play.
 8. Hold a company-wide prelaunch meeting and presentation, led by you, reviewing the entire Gameplan. The goals for this meeting are for each team member to see your vision for the company and have them gain an understanding of their responsibilities.
 9. Over the next several months, have each member of your management team read this book, then hold discussions regarding the book and how you might improve your Gameplan.

Play #30. Fourth Financial Forecast and Executive Summary

Play #31. The Launch

Guidelines for Your Launch

Here's what we recommend:

1. **Create a launch calendar.** Start with your anticipated launch date and, working backward, list every task to be completed in order to meet your target launch date.
2. **Test all your systems and protocols.** Use as close to real-life conditions as you can create.
 - a. Phones and Email
 - b. IT
 - c. Manufacturing
 - d. Website
 - e. Individual and Team Responsibilities
 - f. Pricing
 - g. Digital Marketing Tools
 - h. Sales Training
 - i. Sales and Promotional Materials
 - j. Suppliers
 - k. Sales Management Software
 - l. Financial Management Tools
 - m. Customer Service
3. **If your business model allows for it, conduct a Controlled Opening.** Go live with a limited number of friendly clients, a small marketing area, or a reduced electronic

marketing campaign. This is like a practice scrimmage with another team. It allows you to try everything out in a live but controlled environment. The idea with this limited approach is that you test your systems gradually. If something isn't working correctly, fix it immediately. Then find the root cause and fix it so the problem does not reoccur.

4. **Increase the load.** Once everything has checked out and you're comfortable with the results of Step 3, increase the number of customers, Target Marketing area, and Digital Marketing campaign. This puts some stress on your systems and people. People and operations both have their maximum capacity loads. A person or system that works well in a low volume, low stress setting may not perform the same in a high volume, more stressful situation. Make sure that all systems and people are "go" at the operational levels you expect.
5. **Anticipate that things will go wrong.** Prepare your team for that possibility and coach them on what actions they should take when it happens.
6. **Set launch goals to measure the success of your launch.** These goals could include number of sales, sales close rate, order fulfillment efficiency, customer satisfaction, customer service calls, search engine optimization metrics and so on.
7. **Manage expectations.** Bring on extra staff and set the expectation that everyone will probably be working longer hours and on the weekends until everything is working properly.
8. **Crank it up!** After completing steps 1 — 7, crank up your marketing strategies and turn your sales force loose!

9. **Monitor everything.** During the initial full rollout, monitor all operations and sales very closely. Conduct weekly or even daily meetings with your team to get their input. As your sales and number of clients increase, pay special attention to how you're executing and if you're achieving Operational Excellence. If there's a problem, call a timeout and fix it immediately.

The Decision-Making Process

1. **Identify the Situation / Problem.** Clearly identify and define the situation or problem and the need to make a decision.
 - Discuss the situation with all stakeholders.
 - Create a timeline and decide on a deadline by which the decision must be made.
2. **Identify Key Players.** Choose the team members who will collaborate to devise the best response for the situation. Should this decision be made by you alone, or should you involve others? There's no single correct answer to this question. The best answer I have is, always involve others unless you can't. In other words, there might be issues that are so sensitive or private, you must go it alone. Otherwise, bring in the people with the authority and knowledge to help. If necessary, get the advice of outside experts such as lawyers, accountants, or human resource professionals.
3. **Gather Information.** Decide what you need to know, and make sure you have all the pertinent information.
 - No matter what type of problem you're dealing with, make sure you find and define the Root Cause. By identifying the Root Cause, you'll be able to make corrections, so the problem doesn't reoccur. Also, make sure you're dealing with the cause, not dealing with the symptom.

- If you're dealing with a strategic situation, identify the Core Issues by performing a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis. (See *Play #10. Initial Research.*)
4. **Determine Options.** List all viable options to address the situation or resolve the problem. Spend the necessary time to go through *all* possible options. As you do this, try to anticipate the effect of each option on all parties, other aspects of the company, policies, laws, and other considerations.
 5. **Decide.** Determine the best possible option. Realize that there may be no *perfect* solution, which means you might have to settle for the *best available* option. Take thorough notes about the criteria you used to make your decision. If you're challenged, you'll need your notes.
 6. **Implement.** Decide on the best method and person to implement the final decision. Take considerable care here, because many times *how* the decision is implemented is as important as the decision itself.
 7. **Perform a Postmortem.** After a reasonable period, review your decision for effectiveness and adjust the process as necessary to improve results (either this time or next).

Considerations in the Decision-Making Process

Below are some aspects to consider as you work through the decision-making process.

- **Pressure.** Don't succumb to the pressures that come with making decisions. What may seem to be the easy way now will often cost you twice as much later, both

emotionally and financially. When you're making a difficult decision, think of yourself as an outside consultant, and do what the consultant would do.

- **Personnel Decisions.** These can be among the toughest decisions you'll make. As hard as it may seem, try to take your emotions out of the decision. Seek the advice of outside experts, such as lawyers and HR professionals. Ask the opinions of trusted staff.
- **Decisions Involving Finances or Math.** Make sure you fully understand the math. Don't be embarrassed to keep asking for an explanation until you have a clear understanding.
- **Experts or Experienced Individuals.** Seek out the opinions of people who have specific knowledge about the subject.
- **Anger and Euphoria.** Never make a decision when you're angry or when you're overly excited about something. Wait until everything is calm, then go through the process outlined above.
- **Substances.** Never, never, never make a decision when you have been drinking, using recreational drugs, or using any medication that affects your decision-making abilities.
- **Organizational Excellence.** Being Organizationally Excellent will help you greatly in making difficult and complex decisions. You'll be able to retrieve the necessary information and organize it so you can focus on the important stuff.
- **Information Overload.** Make sure you're focused on only the data and information you need, so you don't get bogged down with nonessential information.

- **Additional Time.** If you need additional time, ask for it and give the reason.
However, don't ask for additional time just to procrastinate or because you don't feel brave enough to execute the decision.
- **Conditional Decisions.** You don't always have to make a final decision. In fact, one of the most utilized methods to ensure that you ultimately make the best decision is to make a conditional decision. Some conditional decisions include: a ninety-day trial period, an "if you do that, then I'll do this" offer, hiring personnel using a temp-to-permanent firm, and putting an employee on probation. In any of these scenarios, if things don't work out, you're not obligated and are free to pursue other options.
- **Courage.** It takes courage to make tough decisions. Anyone can make the easy calls, but to achieve long term success you must muster the Courage to make the tough calls, too. We'll cover more about Courage in the next Play.

Play #32. **Decision Making**

Play #33. **Courage**

Play #34. **Fear of Failure**

Play #35. **Communication Skills**

Guidelines for Verbal Communication

Prepared Speaking

- Know your audience. Who are they, and what key topics are they interested in?
- Remember who you are in relationship to your audience. Are you their boss, an invited guest, an expert? Are you asking for something or giving them something?

- Think strategically. Ask yourself, “What do I want them to walk away with?”
- Be authentic.
- Be as brief as possible.
- Use humor, if appropriate. Self-effacing humor can work great, but make sure it’s appropriate.
- Practice, practice, practice. Writing a short speech and delivering it are two completely different animals. What sounds good in your head as you write it and what sounds good when you hear it are often very dissimilar. If you want to hit a home run — practice, practice, and practice some more. If you can practice in front of an audience, even better.

Impromptu Speaking

- Know your audience. Who are they, and what key topics are they interested in?
- Remember who you are in relationship to your audience. Are you their boss, an invited guest, an expert? Are you asking for something or giving them something?
- Think strategically. Ask yourself, “What do I want them or me to walk away with?”
- Think before you talk. Pausing for a minute to get your thoughts together is fine. Saying nothing is better than saying the wrong thing.
- Be very careful if you have been drinking alcohol, using recreational drugs, or are under the influence of any medication that affects your abilities.
- Never show anger.

Guidelines for Written Communication

- Respond to all communication such as emails and voicemail as soon as possible. The one caveat to this is a reminder that if the written communication involves making a business decision, use all the time you have, up to the deadline, to re-think, re-read, and revise your response.
- Use acceptable grammar and formats.
- Ask others to edit your important communications.
- Never show anger by using **BOLD**, !!!, or other symbols in written communications.

Guidelines for Listening

- Remember the old adage: *“We have two ears and one mouth for a reason.”* In other words, you learn from others by listening to them.
- Focus on the speaker, pay attention, and take notes, if possible.
- Give yourself a mental alert that an introduction, question, or conversation is about to happen. For instance, literally tell yourself, “Listen to his name.”
- Look the speaker in the eye.
- Listen to what is said and what is not said. Often, the unspoken words will tell you more than what’s said.
- Ask questions to demonstrate that you’re listening and want to better understand the subject.
- If you didn’t hear, understand, or remember what was said, apologize, and ask the speaker to repeat what they said.

Guidelines for Using and Understanding Body Language

- Recognize that your facial expressions, posture, position of your hands and arms, and demeanor all tell a story about where your mind is regarding a person or subject. Make sure your body language supports your position on the subject at hand.
- Focus on your audience and don't multitask. Checking your smartphone or email absolutely sends the wrong message.
- Your physical appearance conveys volumes about you. Dress and groom appropriately for the occasion and your role.
- When you're being introduced, look the person in the eye. Nothing is more rude than shaking someone's hand while simultaneously looking past them to the next person you're going to meet.

Play #36. **Your Personal Brand**

Key Personality Traits for a Strong Personal Brand

1. **Likeability.** Is he or she authentically well liked? Of all the things that affect your personal brand, I believe the most important is likeability. If people don't like you, then the rest of your traits become secondary. The easiest way to be perceived as likable is for you to genuinely like other people. When you enjoy people, it will show — and in return, you become likable.
2. **Interest in Others.** Exhibits a genuine curiosity in other people's lives and ideas.
3. **Respectability.** Is respected for possessing knowledge and skill.
4. **Attitude.** Possesses a positive, can-do attitude. People don't want to hear about your problems. They want you to help them solve *their* problems.

5. **Authenticity.** Is a real, down-to-earth person. Be confident but not cocky. Be understanding, compassionate, considerate, empathetic, and caring.
6. **Accessibility.** Is easy to interact with, in person and/or electronically. In a small business, customers must be able to directly contact the “face” of the business when they want to. There should be no or minimal barriers.
7. **Open Mindedness.** Is receptive to all opinions, fair minded, and tolerant. Is willing to conduct a reasonable interchange of ideas and opinions.
8. **Integrity.** Is honest and open in all dealings and communications, both internally and with customers. Is someone who always strives to do the right thing for customers and clients.
9. **Image.** Portrays the attributes that customers want to see. Your image is a combination of your physical, emotional, and intellectual traits, and it plays a big role in your personal brand. Look the part you’re playing and take into consideration your audience’s needs and expectations.
10. **Strong Work Ethic.** Believes that you must earn your customers’ business and loyalty.
11. **Socially Responsible.** Believes in being a good corporate neighbor in your community.
12. **Lives Their Personal Value Proposition.** Always delivers on the Value Proposition that people get when they do business with you.

Play #37. Industry Relationships

Play #38. Corporate Social Responsibility (CSR)

Play #39. Work-Life Perspective and Balance

Creating a Total Life Plan

1. Sit down with your spouse or significant other and discuss your business and personal goals for the next 12 — 36 months. Be as specific as possible. Write them down, and make sure you have agreement and commitment from both of you on every item. Periodically, and as circumstances dictate, review and update your goals.
2. Create a single calendar with all business and family activities on it. As mentioned in *Play #25. Exceptional Individual Execution (EIE)* (and I think it bears repeating), ***Although you might not like to think of it this way, you truly don't have separate business and personal lives — at least, not when it comes to scheduling. You have one life that consists of both business and personal responsibilities.*** Start with the highest priority items and those that can be scheduled far in advance, such as:
 - Birthdays and holidays
 - Vacations
 - Regular work hours (home and office)
 - Workout time
 - Family time
 - Kids' activities
 - Spiritual growth
 - Business travel

3. Commit to sticking to the calendar for the next month. Work when you're supposed to work; play when you're supposed to play. Get your workouts in. Spend time with your kids and spouse. Follow your plan. That's what discipline is.
4. As changes need to be made to the plan and calendar (and there *will* be changes), no problem. Make certain the changes are communicated to everyone and that all important categories in your life are accounted for and in proper balance.

Play #40. Fitness and Health

Play #41. Spiritual Guidance

Postgame Comments

There are lot of details you'll need to manage, but in the end, my advice is simple:

- Take the time necessary to create a great Gameplan.
- Get your entire team on board with all the Plays.
- Review your Key Performance Indicators monthly.
- Review your entire Gameplan quarterly to ensure it's still on target.
- Create a Total Life Plan
- Bring Spirituality into your business and personal life.
- Go to the Entrepreneurs Growth Group website (<https://egg-coach.com>) and set up your free online meeting and to discuss any questions that you have.