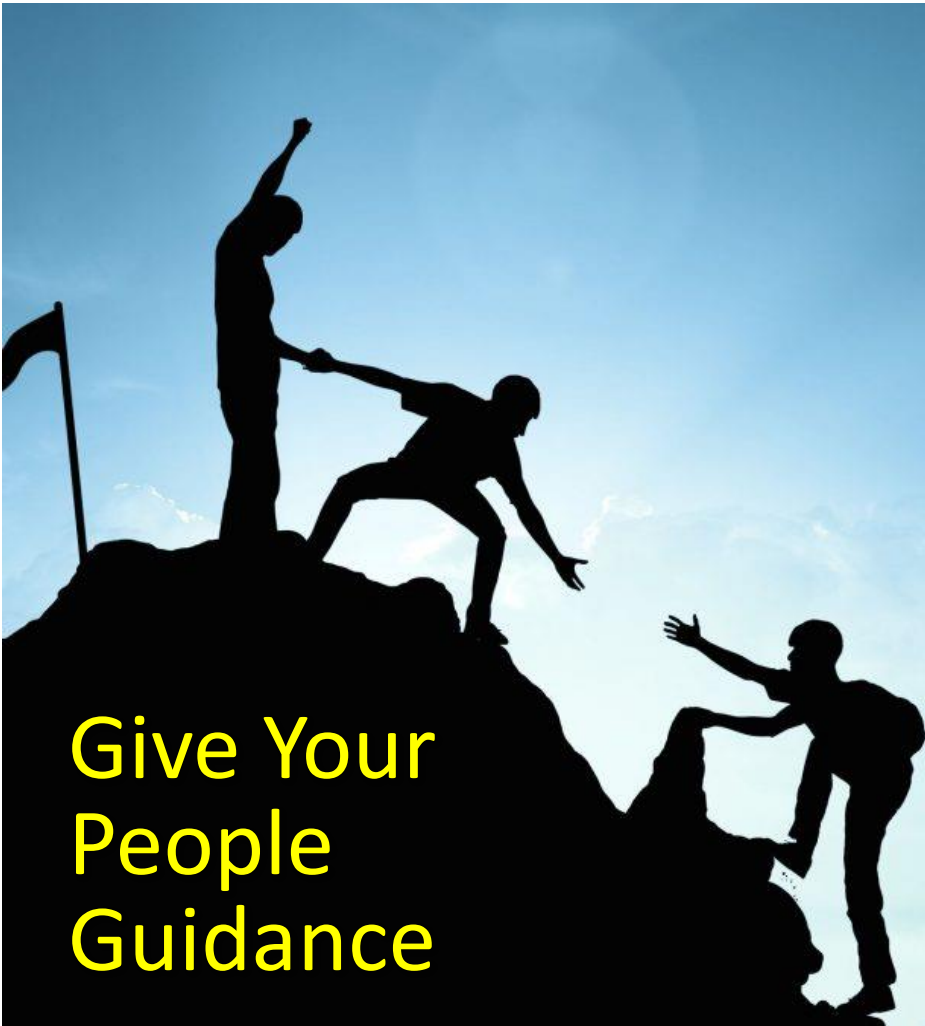


LEADERSHIP

by Dave Graham



SERVICE NATION
ALLIANCE
TRAINING SERIES

Service Nation, Inc.
750 Canyon Dr.
Suite 230
COPPELL, TX 75019

Ph: (817) 416-0978
Toll Free: (877)262-3341
Email: info@serviceroundtable.com
Company website:
www.serviceroundtable.com

Dave Graham

Training Director



- Help to train members
- Create training materials
- Been at SNA almost 2 years
- Actor
- Writer
- Director
- Used to be a gravedigger

THE DIFFERENCE BETWEEN

MANAGERS & LEADERS

17 TRAITS THAT SET THEM APART

It takes more than just a title to inspire people to get behind you.

So what separates a good manager from a great leader?

Here are 17 traits that distinguish the two. Many people have some degree of both.

How do you stack up?

MANAGER

Tells

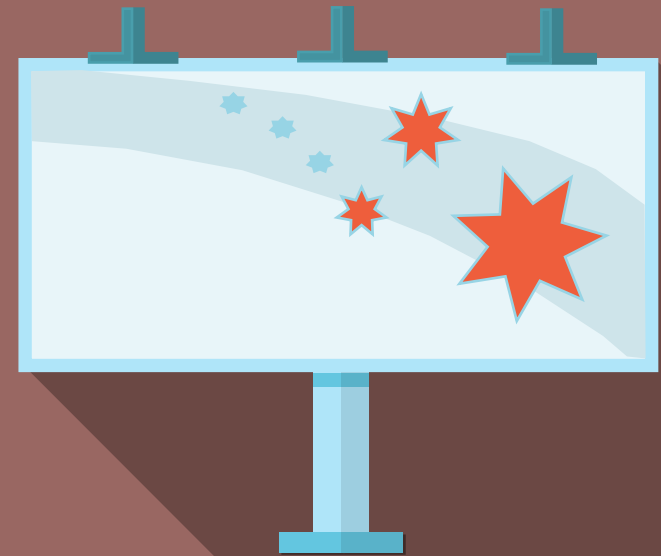


This is what I want you to do, and here is how I want you to do it.

LEADER

Sells

I have this great idea, and I know it will work if I can get you to be a part of it.



MANAGER

LEADER

Plans the Details



I'll send out a memo to everyone and set a time for us to meet.

Sets the Direction



Let's get everyone together. I've got some exciting news you'll all want to hear.

MANAGER

LEADER

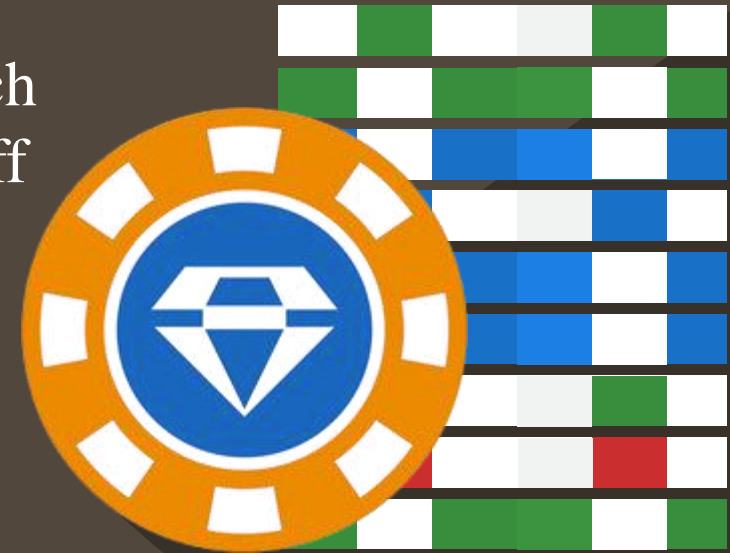
Minimizes Risks



Time is money.
The sooner I get
this done, the
better.

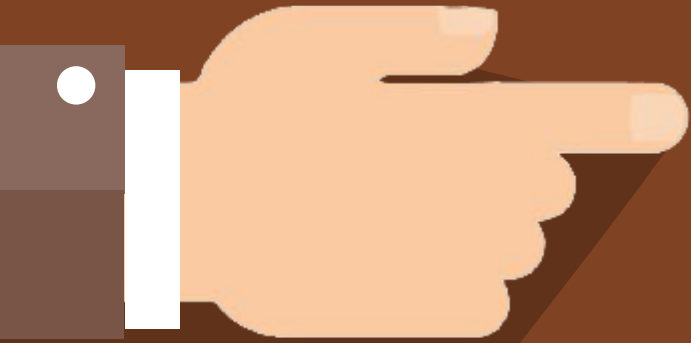
Takes Risks

This might stretch
us, but the payoff
will make it
worthwhile.



MANAGER

Instructs Employees



If you're not sure of what your job entails, you can check the flowchart on my door.

LEADER

Encourages People

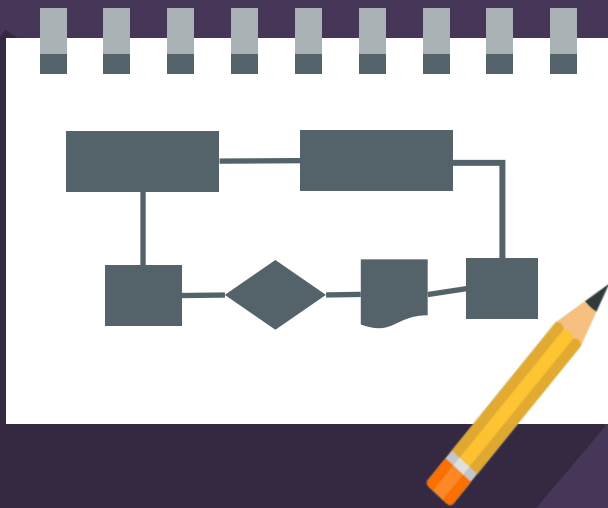


If you think you have a better way, my door is always open.

MANAGER

LEADER

Has Objectives



Let's stick to the plans so these get done ASAP.

Has Vision

I like your thinking. Let's see how we can work this into our operation.



MANAGER

Meets Expectations



We met our goals for this quarter – mission accomplished.

LEADER

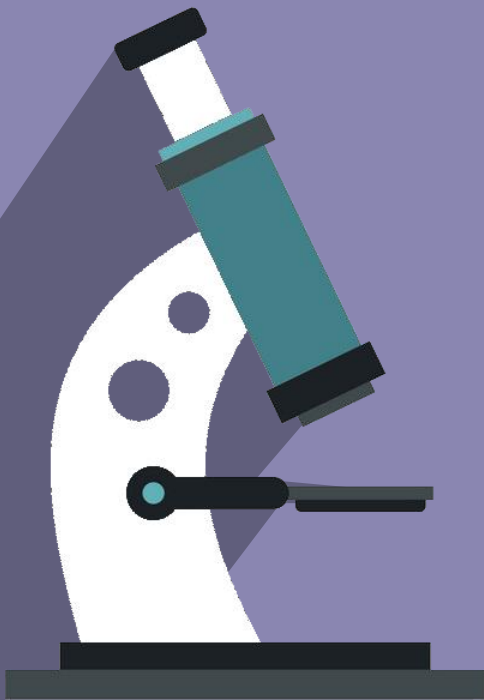
Charts New Growth

Our goals are just a starting point. We are limited only by how far we want to reach.



MANAGER

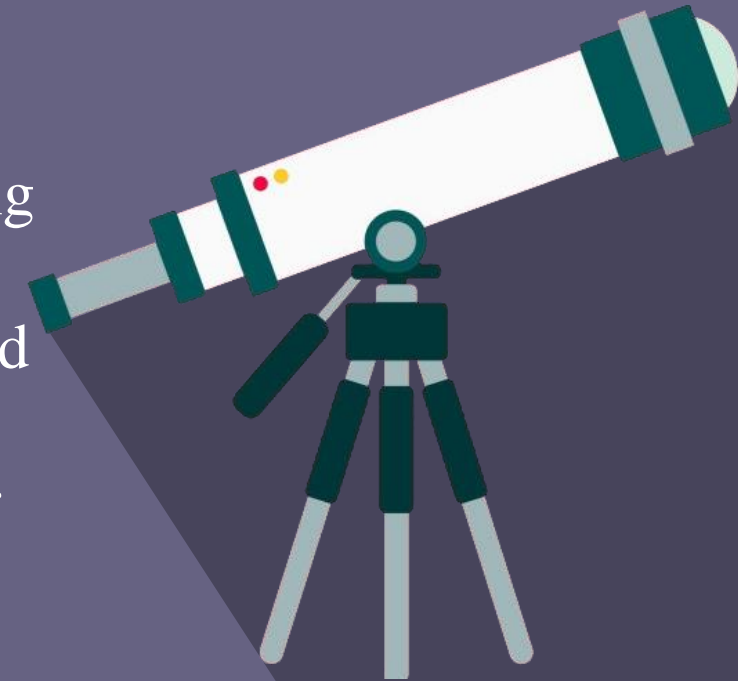
Eyes The Bottom Line



We got everything done and came in under budget.

LEADER

Eyes the Horizon



We got everything done, came in under budget, and laid the groundwork for the next phase.

MANAGER

Accepts The Status Quo



If it ain't broke,
don't fix it.

LEADER

Challenges The Status
Quo

I know it isn't
broken, but is
there a way to do
it that's even
better?



MANAGER

Sees A Problem



Our plan didn't work. I've got to fix it before I get blamed.

LEADER

Sees An Opportunity



Our plan didn't work. Let's put our heads together to see what we can learn from this.

MANAGER

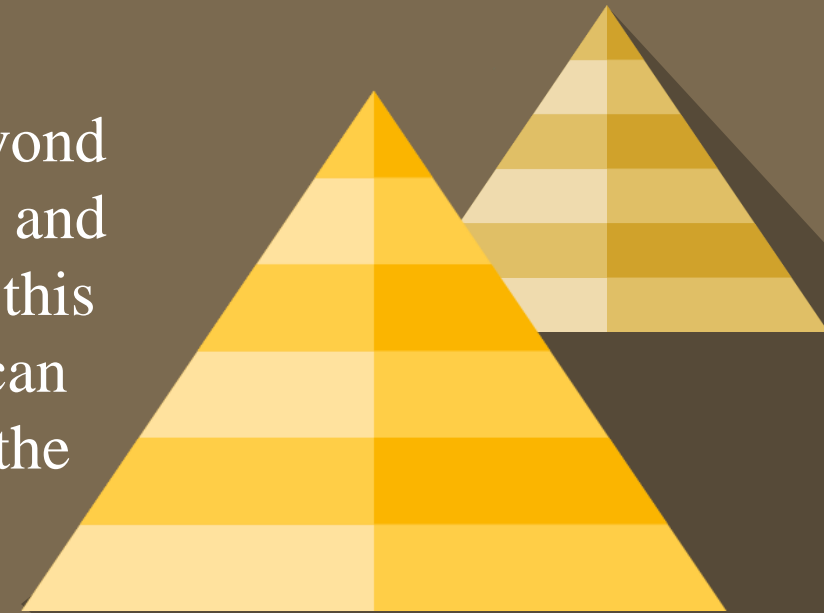
LEADER

Thinks Short-Term



We can't afford
this kind of capital
purchase right
now.

Thinks Long-Term



Let's look beyond
the cost today and
explore what this
investment can
mean down the
road.

MANAGER

Follows The Map



Our directions are very clear. Stick to them.

LEADER

Carves New Roads

If we keep going down the same road, we'll only end up in the same place.



MANAGER

Approves



You did your job well, and on time.

LEADER

Motivates



You know, I've never had to worry about you doing your job – and doing it well.

MANAGER

Establishes Rules



Stick to the script.
We can't have
everyone just
running around
doing their own
thing.

LEADER

Breaks Rules

What are we doing
that holds people
back?



MANAGER

Assigns Duties



I need you here at 8 a.m. sharp. Our customers depend on us being on time.

LEADER

Fosters Ideas

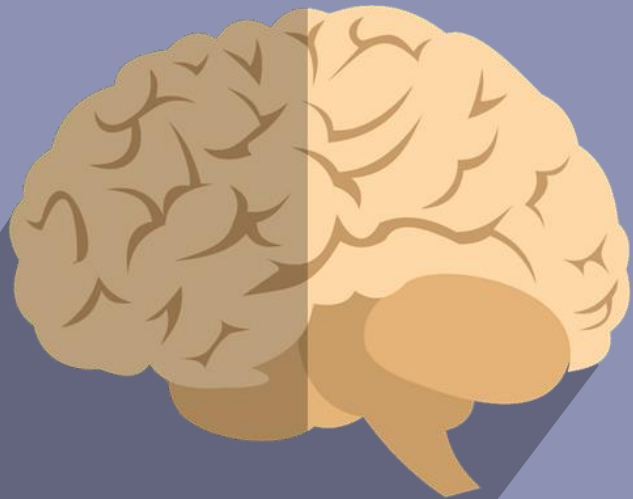


Customers tell me they love working with you. I'd like you to show some of the others how you do that.

MANAGER

LEADER

Votes With Their Head



This idea makes
the most sense.
Let's go with that.

Votes With Their Heart

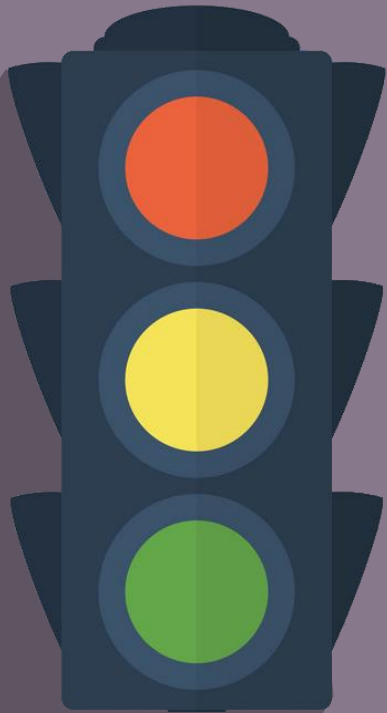


This idea is
interesting and
gutsy. How can we
implement it?

MANAGER

LEADER

Relies On Control



My coworkers
know the
consequences if
they get out of
line.

Inspires Trust

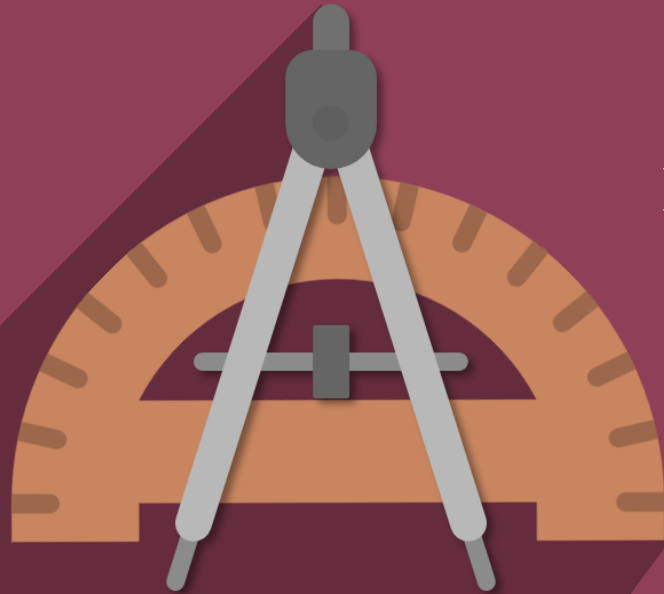


My workers know
I trust them to be
the best they can
be.

MANAGER

LEADER

Does Things Right



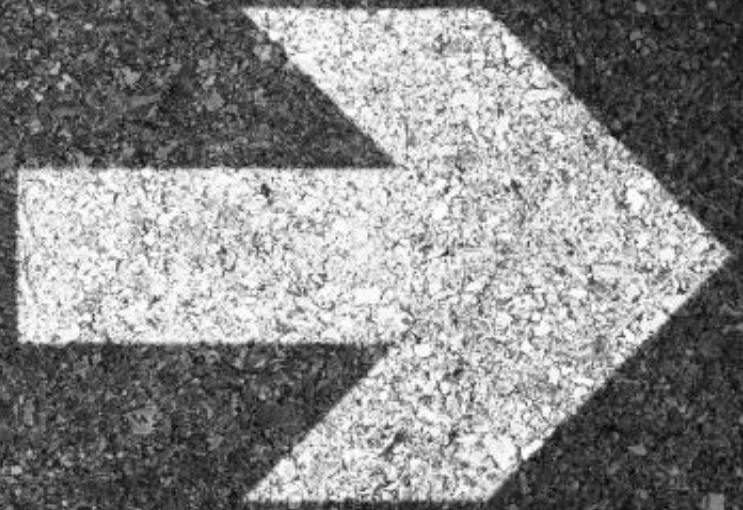
Rules are rules. As much as I'd like to, I can't make an exception.

Does The Right Thing



I know what the rules say. But sometimes you just need to break them.

So it's another choice,
right?



Well, yes.

And no.



Yes

Very definitely, when the situation calls for it, you should choose between acting like a leader and acting like a manager.

To make leadership decisions like a manager (or vice-versa) could have sometimes disastrous effects.

No

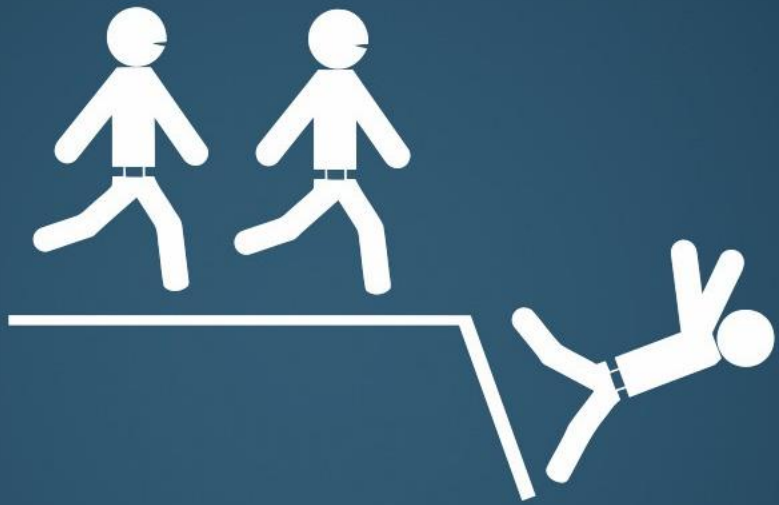
Thinking that one role (or way of thinking) is better than the other is also a big mistake.

Only acting as one of these (when you own a business) will limit both you AND the business.

Both

Running a business successfully means having to do both. When leadership is called for, you have to make decisions like a leader. When management is the best course, managerial decisions are the way to go.

And, more often than not, you'll have to wear both hats at the same time. You'll have to produce both leadership AND management.



**FOLLOW THE
LEADER**

What Is Leadership?

Leadership means different things to different people at different times, depending on the situation.

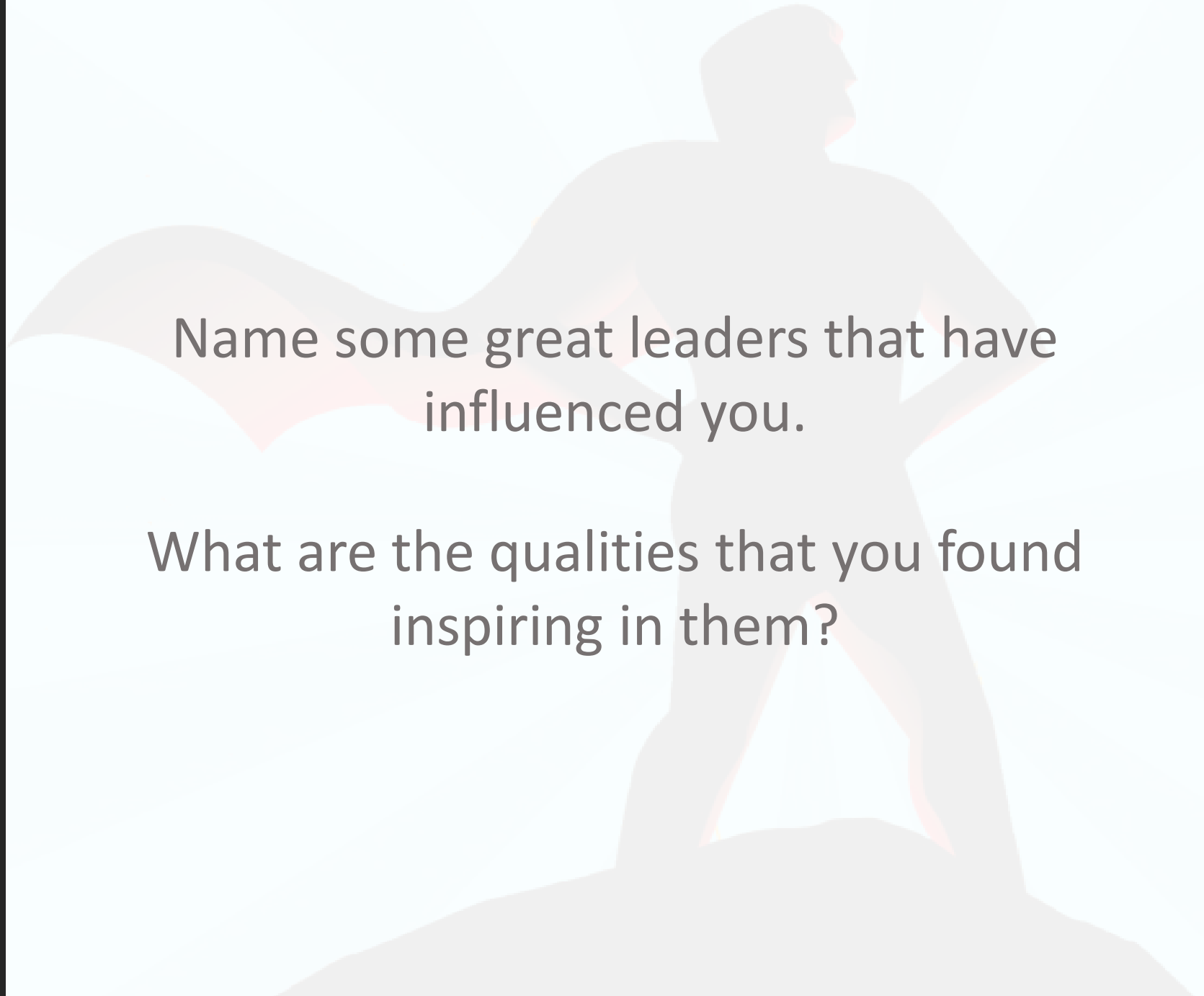
But at its core, leadership really is just one single thing:

Inspiring others to pursue a common vision with you.

What Is Leadership?

Name some great leaders that have influenced you.

What are the qualities that you found inspiring in them?



The Qualities of a Leader





-INTEGRITY

INTEGRITY

People always have respect for the person who does the right thing, honestly.



FOCUS

If you don't know what your mission is or where you're going, no one else will, either.



PASSION

PASSION

Display your dedication to your employees – own it, live it, breathe it.



RESPECT

Everyone has something good,
valuable and important. Find it,
highlight it and value it.

RESPECT

CARING

Care about your business and the people in it. Show this in actions and in words.



A close-up photograph of a person's hand reaching out, palm up, in a gesture of offering or support. The hand is positioned on the left side of the frame, with the fingers slightly curled. The person is wearing a light blue, long-sleeved shirt. The background is a soft, out-of-focus green, suggesting an outdoor setting with foliage. On the right side of the image, there is a dark grey rectangular box containing text in yellow.

COMPASSION

In addition to your staff and business, you should show how much you care for your community and the world you live in. Show this through words and actions.

PERSUASION

People want to believe in you, but this rarely happens on its own. You often have to persuade them.





CONFIDENCE

For others to believe in you, you have to believe in yourself. Balance confidence with arrogance, however.

A young girl with dark curly hair, wearing a pink sleeveless dress, is captured in a moment of pure joy. She has her arms raised high in the air, and her mouth is wide open in a happy shout. The background is a soft, out-of-focus grey, which makes the vibrant, multi-colored confetti falling all around her stand out. The confetti consists of small, shiny pieces in various colors like red, green, blue, yellow, and purple. The overall mood is one of celebration and achievement.

CELEBRATION

No matter how busy your schedule is, take time to celebrate successes – both business and personal. Not doing so can lead to burnout.

CLARITY

If you are extremely clear about what's most important, people will always be more willing to follow you.





EMPOWERING

If you want people to have faith in you, you have to have faith in them. Give them the power to make decisions and grow.

HUMILITY

HUMILITY

It's important on a day-to-day basis to let everyone know it's not just about you, but the good of everyone.



COLLABORATION

The best leaders create more leaders, not followers. Collaborating with people pulls them into the process so they can own it, too.



COMMUNICATION

Sharing the vision is essential. People have to hear your story – the right story, told the right way, at the right time. That's inspiring.

COMMUNICATION



Courage

COURAGE

Successful leaders are not afraid to take risks or make mistakes. They are also not afraid to hire people smarter than them!

SELF- AWARENESS

Know your strengths and weaknesses. Don't surround yourself with people exactly like you. Find people who have strengths that complement you.



GENUINENESS

People know when you are walking the talk. Live by the values you espouse. Lost values are probably the biggest cause of leadership failure.



SO HOW DO WE

DO ALL THAT?

The Recipe for Leadership

Recipe:

1. Create a Vision:

- The vision doesn't always have to be large and over-arching, like becoming the best automaker on the planet. It could be becoming the best customer-service unit or sales team your company has ever had – even if just for that one quarter.

Serves:

From:

The Recipe for Leadership

Recipe:

2. Motive and Inspire:

- Why would others want to do this with you?
- Do they care about their work?
- Do they care about themselves?
- What is their personal/professional stake to want to do better?

Serves:

From:

The Recipe for Leadership

Recipe:

3. Manage the Vision:

- Once you have sold the people around you on the idea that the effort is worthwhile, you must prove that to them, each step of the way, as you make progress. Also, show those not directly involved in the effort why what you are doing matters to them, too.

Serves:

From:

The Recipe for Leadership

Recipe:

4. Coaching the Team:

- Leaders do not create followers, they create more leaders. When you build up the individual, the team takes care of itself.

Serves:

From:

It all depends on

your

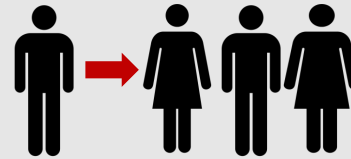
Style



LEADERSHIP STYLES

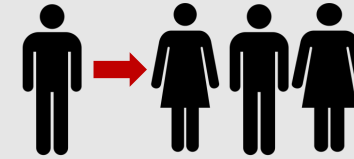
- Coercive
- Pacesetting
- Coaching
- Democratic
- Affiliative
- Laissez-faire
- Servant

Coercive



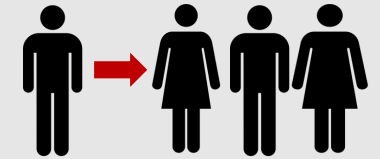
Do what I tell you!

Pacesetting



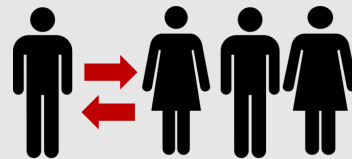
Do as I do!

Coaching



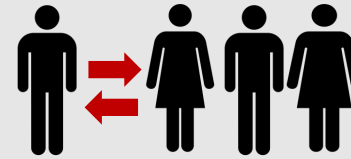
Try it this way.

Democratic



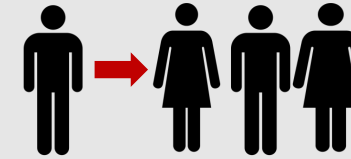
What do you think?

Affiliative



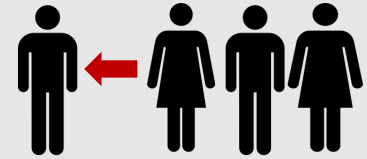
Let's make this work!

Laissez-faire



Do what you think is best.

Servant

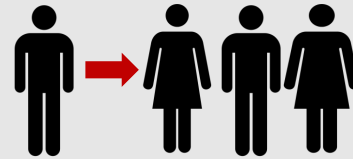


What can I do to help you?

LEADERSHIP STYLES

- Coercive

Coercive



Do what I tell you!

Pros:

- Clear expectations for what needs to be done, how and when.
- Clear division between leader and followers.

Cons:

- Doesn't usually inspire followers.
- Usually only effective for short-term.
- When leader is absent, chaos follows.

LEADERSHIP STYLES

- Coercive
- Pacesetting



Pros:

- Sets a very high bar for performance.
- Can be very inspiring.
- Usually creates great loyalty.

Cons:

- The bar is VERY HIGH.
- Always requires leader to be involved in day-to-day business.
- Can eventually demotivate some followers.

LEADERSHIP STYLES

- Coercive
- Pacesetting
- **Coaching**

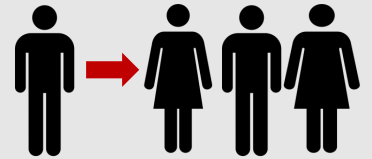
Pros:

- Levels the playing field.
- Builds confidence and competence.
- Promotes both individual and teams.
- Develops strong commitment to goals.
- Develops new leaders.

Cons:

- Requires the leader to have thorough knowledge and confidence.
- Always requires leader to be involved in day-to-day business.
- Can be time-consuming.

Coaching

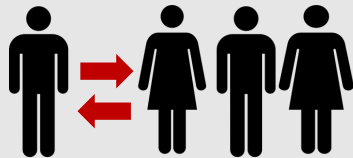


Try it this way.

LEADERSHIP STYLES

- Coercive
- Pacesetter
- Coaching
- **Democratic**

Democratic



What do you think?

Pros:

- Provides problem-solving for complex issues.
- Encourages a creative environment.
- Allows future leaders to emerge.
- Promotes strong connectivity between co-workers.

Cons:

- Always more time-consuming.
- Can create uncertainty if there is no consensus.
- Creates unreasonable expectation on the part of some individuals or in some situations.

LEADERSHIP STYLES

- Coercive
- Pacesetting
- Coaching
- Democratic
- **Affiliative**



Let's make
this work!

Pros:

- Promotes working harmony that eliminates conflict.
- Builds very strong teams.
- Encourages frequent positive feedback.
- Creates high levels of trust.

Cons:

- Poor performance has a tendency to go unchecked or be overlooked.
- Can lack direction if leader is not highly focused.

LEADERSHIP STYLES

- Coercive
- Pacesetter
- Coaching
- Democratic
- Affiliative
- **Laissez-faire**

Pros:

- Leader has more time to address high-level issues.
- “Handle it” approach often grooms successful future leaders.
- Results-driven style can produce fantastic outcomes.

Cons:

- If company culture and support is lacking, can be chaotic.
- Can result in groups and individuals being pulled in opposite directions.
- Does not provide much in the way of direction or positive feedback.



LEADERSHIP STYLES

- Coercive
- Pacesetting
- Coaching
- Democratic
- Affiliative
- Laissez-faire
- **Servant**

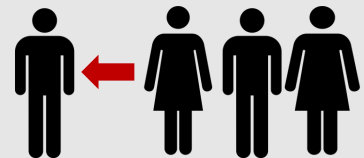
Pros:

- Engenders trust, loyalty, and high morale among team members.
- Leads to an ethical culture in the company.
- Can be effective in solving problems.

Cons:

- Not suited to situations which require quick decisions or meet tight deadlines.
- Can make members feel that company direction is lacking or unfocused.

Servant

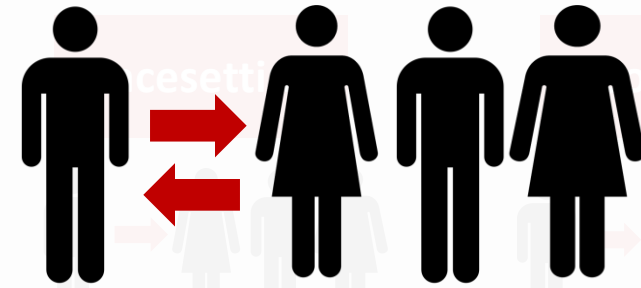


**What can I do
to help you?**

LEADERSHIP STYLES

BONUS!

Situational



**Which style
best works in
this situation?**

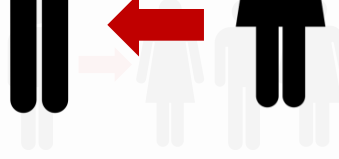
Coercive



What I tell you!

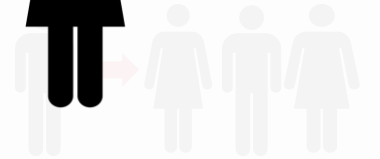


Permissive



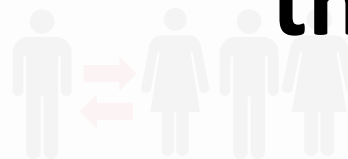
Do as I say, not as I do.

Participating



Try it this way.

Affiliative



Let's make
this work!

Laissez-faire



Do what you
think is best.

Servant



What can I do
to help you?

- Coercive
- Permissive
- Participating
- Coercive
- Affiliative
- Laissez-faire
- Servant

Sounds

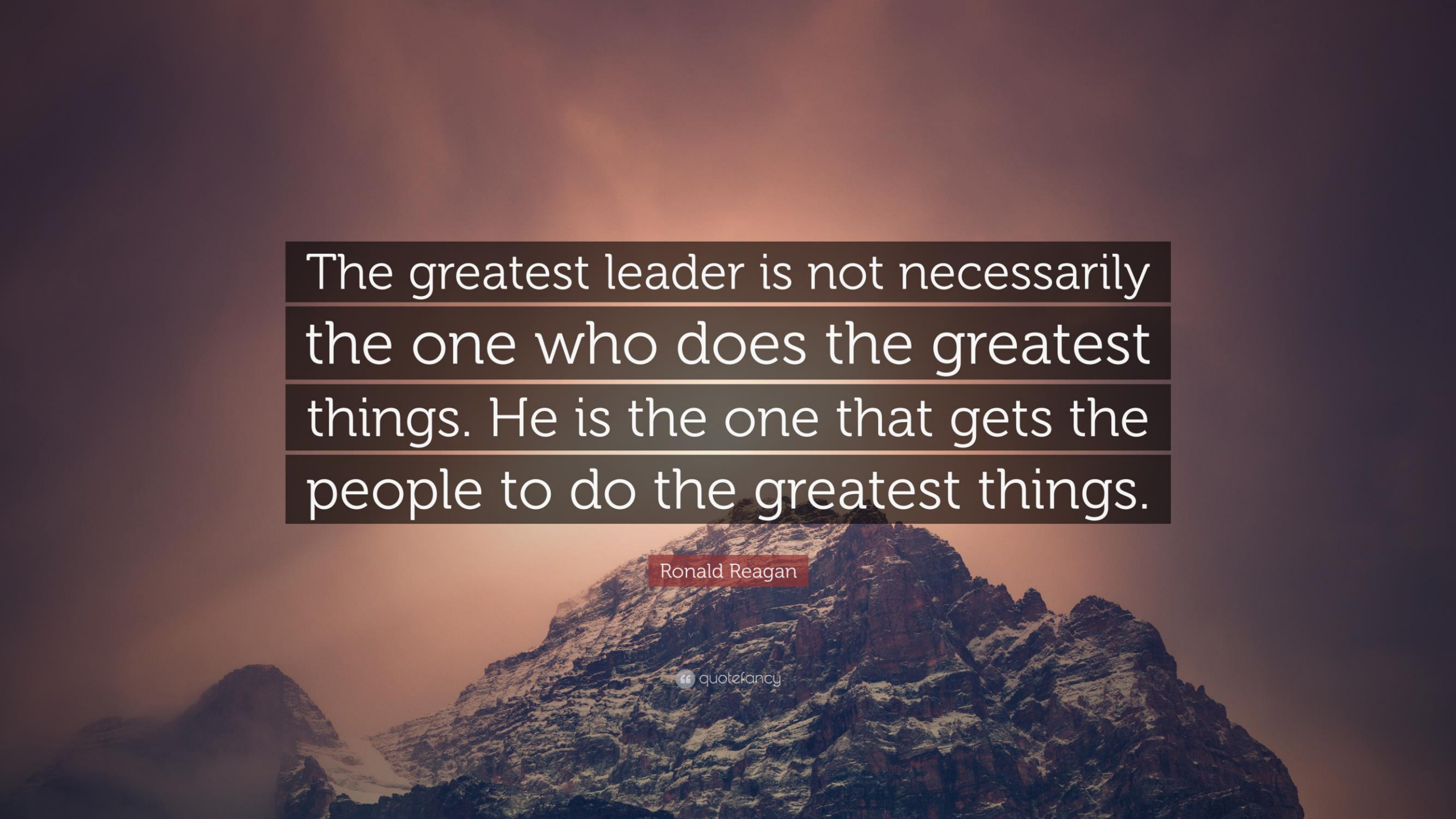
OVERWHELMING

doesn't
it?



Leaders are made, they are not born.
They are made by hard effort, which
is the price which all of us must pay to
achieve any goal that is worthwhile.

Vince Lombardi



The greatest leader is not necessarily
the one who does the greatest
things. He is the one that gets the
people to do the greatest things.

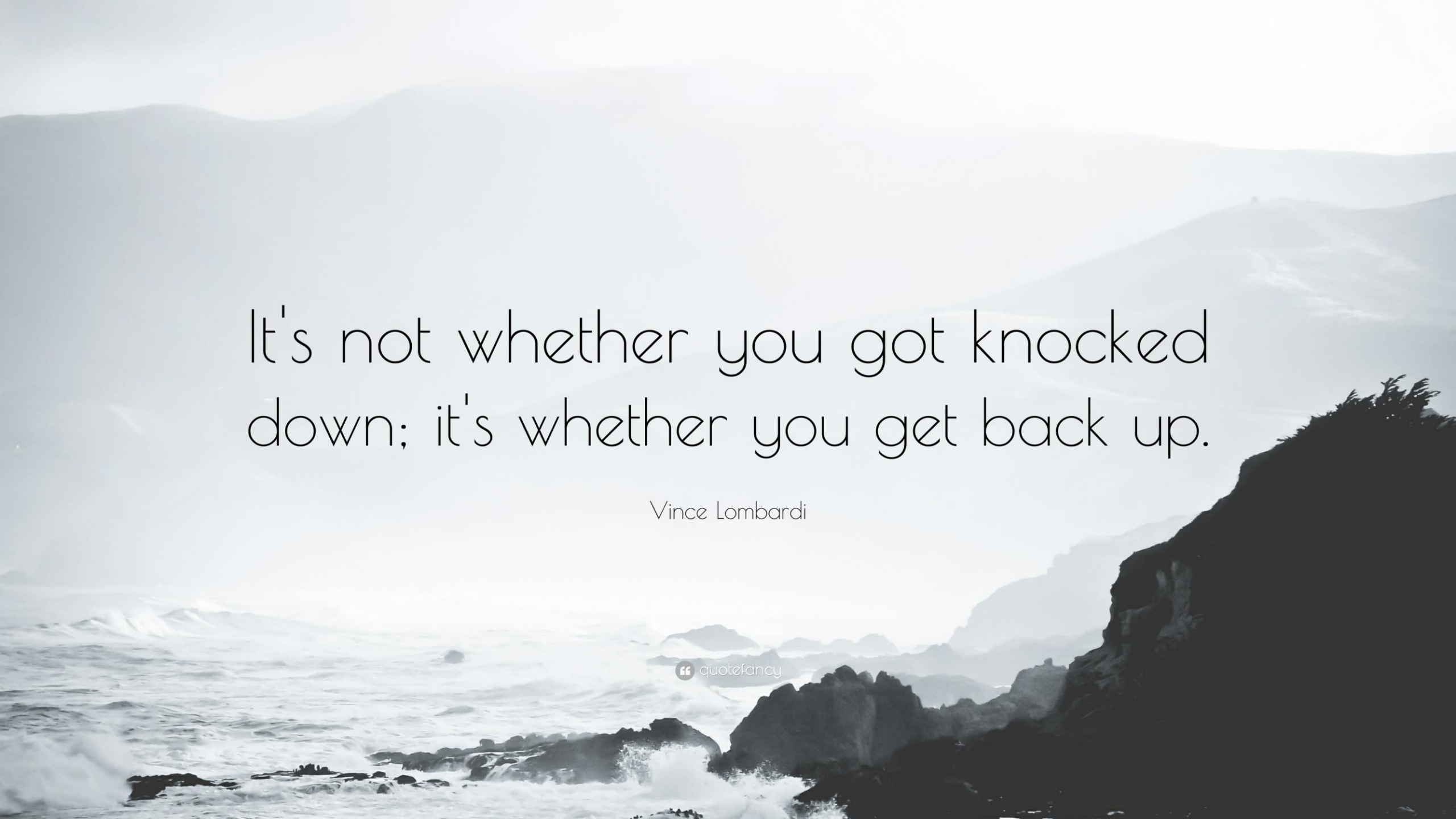
Ronald Reagan

quote fancy

**What if
things go
wrong?**



What if I screw it up?



It's not whether you got knocked
down; it's whether you get back up.

Vince Lombardi

quote fancy



10 STEPS

**GREAT LEADERS
TAKE WHEN THINGS
GO WRONG**



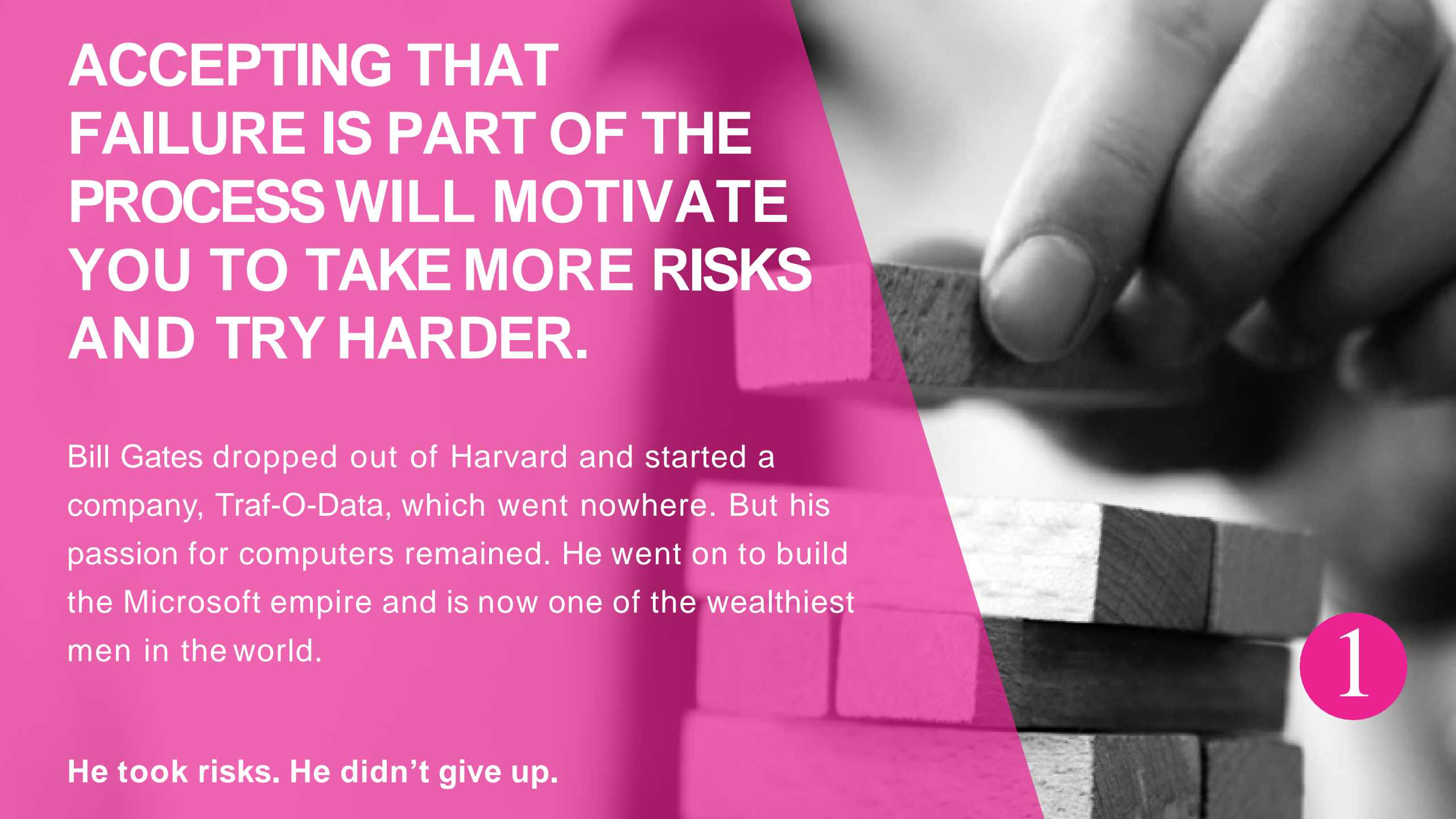
*The only real mistake is the one
from which we learn nothing.*

– HENRY FORD

**At the end of the day, it's how you embrace your mistakes in the
pursuit of success that defines your character as a leader.**

1

GREAT LEADERS *ACCEPT*
THAT FAILURE IS INEVITABLE.



ACCEPTING THAT FAILURE IS PART OF THE PROCESS WILL MOTIVATE YOU TO TAKE MORE RISKS AND TRY HARDER.

Bill Gates dropped out of Harvard and started a company, Traf-O-Data, which went nowhere. But his passion for computers remained. He went on to build the Microsoft empire and is now one of the wealthiest men in the world.

He took risks. He didn't give up.

1



2

GREAT LEADERS

CONFRONT FAILURE.



FROM A YOUNG AGE WE ARE TAUGHT THAT MAKING MISTAKES IS BAD.

Painful memories of past failures trigger negative emotions like fear and anxiety which prevent us from taking risks in the present. It's better to confront your failure than to run away from it.



3

GREAT LEADERS

ARE VULNERABLE.

SUCCESSFUL LEADERS NEVER HIDE THE FACT THAT THEY MAKE MISTAKES.

OPEN UP TO YOUR TEAM WHEN YOU GET IT WRONG

Create an environment where they can admit their failures too.

Surround yourself with a strong team who will rally behind you or a mentor who will hold you **accountable and offer guidance. This will ensure** you don't make the same mistake twice.



4

GREAT LEADERS

FAIL FORWARD.



“ THOMAS EDISON SAID,
*I have not failed. I've just
found 10,000 ways
that won't work* ”

Change your perspective.

See your failures as stepping stones to greatness
and let go of your fear of getting it wrong.



WRITE DOWN MOTIVATIONAL QUOTES OR STORIES ABOUT LEADERS

who failed before they became successful.

- **Stick them up in your office.**
- Make them your mantra to turn to when you feel defeated.



5

GREAT LEADERS

RECOVER FAST.

WHEN SOMETHING GOES WRONG, PEOPLE WILL INEVITABLY SEEK CONTEXT.

THE BEST LEADERS DO NOT LET THE BURDEN OF THE BLAME GET TO THEM.

- Help people to understand the context of the problem.
- **Respond confidently with solutions.**

5





6

GREAT LEADERS

FIGHT BACK.

35% OF OUSTED CEOS

returned to an active executive role within two years of departure, but **43% effectively ended their careers.**

LEADERS ARE QUICK TO BLAME THEMSELVES

and often dwell on the past rather than look to the future. The ability to rise above failure is an essential feature of becoming a great leader.

- Fight back.
- Be energised by failure.
- Look for the opportunities it brings.



7

GREAT LEADERS
MAKE TOUGH CHOICES.



YOU ARE WISER BECAUSE OF YOUR FAILURES.

Weigh up the worth of your mistake and decide
**whether it's worth fighting for or
letting go of.**



DEVELOP A STRATEGY TO MOVE
FORWARD. TRUST YOUR INSTINCTS.

Akio Morito co-founded Sony. The first product they sold was a rice-cooker which burnt rice more than it cooked it. They made the choice to abandon this idea and moved on to building a multi-billion dollar software company.

8

**GREAT LEADERS
*REALIZE THEIR
RESPONSIBILITY.***



APPRECIATE THE DUTY YOU HAVE AS A LEADER TO OVERCOME ADVERSITY.

Great leaders have a profound impact on others.

HOW ARE YOU USING THE LESSONS YOU HAVE LEARNED TO INFLUENCE THOSE AROUND YOU?

Find innovative ways to improve your skills and become a more **effective leader for your team.**

A black and white photograph of a person working at a laptop in a workspace. The person is wearing a light-colored hoodie and is seen from the side, typing on the keyboard. In the foreground, there is a dark coffee cup on the left and a notebook with a pen on the right. The background is slightly blurred, showing another laptop and some office equipment. The overall scene is a professional or creative workspace.

9

GREAT LEADERS

TAKE ONE FOR THE TEAM.

SOMETIMES YOUR TEAM WILL WANT TO MAKE RISKY DECISIONS

- the kind that could achieve great success or
could go horribly wrong.

**BE PREPARED TO HAVE THEIR BACK IF THEY
FAIL. BUT LET THEM TAKE THE RISK ANYWAY.**

Establish a company culture where failure
is celebrated.

10

GREAT LEADERS KNOW

WHEN TO TAKE A STEP BACK.



IT'S REFLECTION TIME AGAIN.

Take a step back and consider the failures
you recognize, the lessons learned
and the opportunities available.

10



ONE FINAL PIECE OF INSPIRATION:

*“Only those who dare to fail greatly can
ever achieve greatly.”*

– ROBERT F. KENNEDY

IT'S ALL ABOUT THE
ENVIRONMENT




Lay the right kind of soil.

Give it what it needs.

Keep out the weeds.

What you want
will grow.





If you
don't
do it,

some
one else
will.

Do I Really
Need This?

••• THE BIGGEST •••
MISTAKE

A SMALL BUSINESS
CAN MAKE IS

TO THINK

LIKE A SMALL BUSINESS

TAKEAWAYS



1. **Leadership and Management are Not the Same** – Know the characteristics of both and how to tell the difference.
2. **Know When to Lead and When to Manage** – Different circumstances require different approaches, especially if you are wearing both hats. Supply what's called for – even if it's a combination of the two.
3. **You Can Be the Leader You Want to Be** – Being a good leader isn't accidental – you have to work at it. Consciously work on the qualities of leadership so that you're ready when it's called for.
4. **There are Different Styles of Leadership** – Study the styles and align yourself with the ones that best fit your personality, your people and your situation. Learn when to use which styles, and how to combine them.
5. **Leadership Means Making Mistakes** – If you wait to be perfect leader, you'll be waiting the rest of your life. Difficult times are the times leadership is needed most – and the times you're most likely to make a mistake. Own your mistakes, learn from them, and improve.
6. **There's No Such Thing as a Vacuum in Leadership** – If you don't lead, someone in your organization will.

MANAGEMENT: SIMPLIFIED

by David Graham



Tips For
Effective
Management



SERVICE NATION
ALLIANCE
TRAINING SERIES

Service Nation, Inc.
750 Canyon Dr.
Suite 230
COPPELL, TX 75019

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Toll Free: (877)262-3341
Email: info@serviceroundtable.com
Company website:
www.serviceroundtable.com



MANAGEMENT
PHILOSOPHY
(simplified)

A GOOD
MANAGER
ONLY HAS TO DO

TWO
THINGS



REMOVE ALL THE
OBSTACLES THAT KEEP
THE PEOPLE WHO
REPORT TO YOU FROM
DOING THEIR JOBS

ONCE THING 1 IS DONE –
IF THE PEOPLE STILL
CAN'T DO THE JOB, FIND
PEOPLE WHO CAN



ACCOMPLISHING





OBSTACLES THAT KEEP PEOPLE FROM DOING THEIR JOBS

- They don't know what to do
- They don't know how to do it
- They don't have time to do it
- They don't think they should have to do it
- They don't want to do it
- It can't be done



OBSTACLES THAT KEEP PEOPLE FROM DOING THEIR JOBS

- They don't know what to do

JOB DESCRIPTIONS



Job
descriptions
need to be:



Clear



Consistent



Accurate



Realistic



Accountable



Owner

Visionary

- **Development of Career Path for All**
- **Big Picture of Planning Long Term Growth**
- **Marketing Structure Development**
- **Strategic Relationships for future growth of company**
- **Development of Managers and Best Practices**
- **Planning & Budget Approval**



Service Manager

Manages the Service Department

- **Technician Scheduling**
- **Recruitment/Retention**
- **Ability to Achieve Short and Long Term Goals**
- **Motivation, Measures Team & Personal KPI**
- **Advance and/or Replace Producers**
- **Educate Production Field Techs**



Office Manager

Manages Administrative Tasks

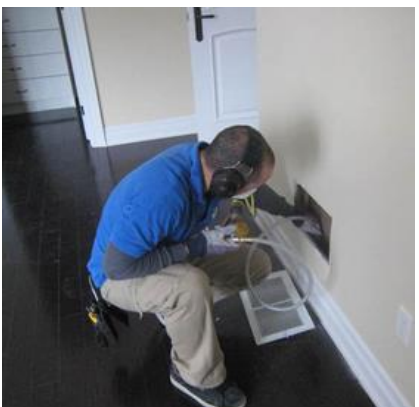
- **Developer of Best Practices**
- **Organize office operations and procedures**
- **Ability to Achieve Short and Long Term Goals**
- **Motivation, Measures Team & Personal KPI**
- **Educate Customers and Customer Service Representatives**



Sales Manager

Manages Sales Force

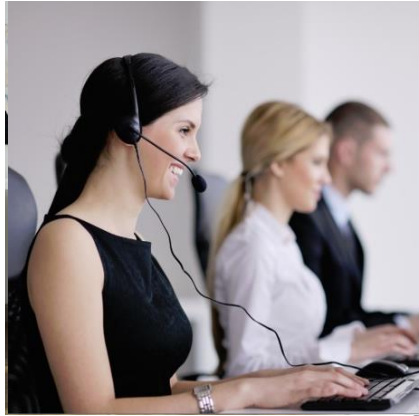
- **Developer of Best Practices**
- **Recruitment/Retention**
- **Ability to Achieve Short and Long Term Goals**
- **Motivation, Measures Team & Personal KPI**
- **Advance and/or Replace Producers**
- **Educate Sales/Comfort Advisors**



Technician

Front Line Customer Service in the Field

- **Ventilation and air conditioning systems and equipment repair and maintenance**
- **Keep daily logs and records of all maintenance**
- **Ability to Achieve Short and Long Term Goals**
- **Measure Personal KPIs**
- **Educate Customers**



Customer Service

Front Line Customer Service in the Office/on the Phone

- **Maintain a positive, empathetic and professional attitude**
- **Respond promptly to customer inquiries**
- **Process orders, forms, applications, and requests**
- **Ensure customer satisfaction**
- **Educate Customers**



OBSTACLES THAT KEEP PEOPLE FROM DOING THEIR JOBS

- They don't know what to do
- **They don't know how to do it**

If employees don't know how to do a thing, it's probably a lack of:



AND/
OR



A hand is shown on the left side of the frame, holding a white puzzle piece. The puzzle board is composed of white pieces, with one piece in the center being a vibrant blue. The word 'POLICIES' is printed in bold, black, sans-serif capital letters on the white piece held by the hand. The word 'PROCEDURE' is printed in bold, white, sans-serif capital letters on the blue piece. The background is a grid of white puzzle pieces, some of which are missing, creating a pattern of interlocking shapes.

POLICIES

PROCEDURE

TYPES OF MANUALS YOU MAY NEED



1. **Employee Handbook** - The employee handbook can be used to bring together employment and job-related information which employees need to know.
2. **Manager Handbook** – Beyond the Employee Handbook, this manual can contain management philosophy, ways to communicate and implement company culture, sensitive company information, etc.
3. **Operations Manual** - This is the manual for operations of the company or businesses. It is a set of standards and procedures for operations, work standards, and policies of the company.
4. **Safety Manual** – A manual, in line with OSHA standards, that outlines safety guidelines and regulations
5. **Crisis Management/Emergency Manual** - A manual on how to respond to crisis or tragedies such as earthquake, fire, storms, tsunami, or violence in the work premises.

A top-down view of a meeting table with hands, coffee cups, and training-related graphics. The word "TRAINING" is written in large, bold, dark green letters across the top. Below it, there are several icons: a lightbulb, gears, and a pair of glasses. To the left, an orange circle contains the word "SKILL" in white. To the right, a dark grey circle contains the word "DEVELOP" in white. A hand is pointing at the "DEVELOP" circle. There are also three coffee cups on the table.

TRAINING

SKILL

DEVELOP

TRAINING IDEAS



1. **Standard Training Calendar** – There should be regular, predictable, ongoing training, all the time. Period.
2. **Specialized Training** – If you create training tracks for each role in your company, and have them prepared in advance, you can make the most of any down time without finding busy work for your employees.
3. **Cross-training** – Again, by having training lined up in advance that is immediately available, you can take advantage of employees who might be ready to assume new responsibilities.
4. **Remedial Training** – If employees are frequently not in line with company policies and procedures, then prepared training gives them an opportunity to immediately improve. Further, if you have a documented training program, it can be support in case of necessary dismissal.



OBSTACLES THAT KEEP PEOPLE FROM DOING THEIR JOBS

- They don't know what to do
- They don't know how to do it
- **They don't have time to do it**

TIME MANAGEMENT





TIME MANAGEMENT STRATEGIES

1. Set realistic goals
2. Eat the frog
3. Automate your tasks
4. Organize your files
5. Back up your files
6. Track your time
7. Limit your social media time
8. Avoid multitasking
9. Learn to prioritize

A man in a tan shirt and cap is smiling and holding a tablet. He is standing in front of a building with horizontal siding. In the background, another man in a dark shirt and cap is working. The scene is brightly lit, suggesting an outdoor or well-lit indoor environment.

A Day in the Life of a SMALL BUSINESS CONTRACTOR

DISCLAIMER

We know that our members are all unique individuals, and that their businesses are unique as a result. Therefore, we know that not EVERY point we make in training will pertain to EVERY member.

However, since we are a Best Practices Organization, it is our policy and our practice to suggest beneficial solutions for our members. The following reflects the PRINCIPLES and the IDEALS that we encourage our members to embrace – principles and ideals that have helped so many of our members become very successful.

So, with that in mind, don't look for the differences between the following scenario and your own situation, or be determined to show how "that wouldn't work for me." Instead, look for ways to incorporate the ideas presented. Reach out to us at any time for help or suggestions on how to make these ideas work in your unique situation.

A close-up photograph of a hand using a key to unlock a wooden door. The door is a rich brown color with a silver handle and lock mechanism. The hand is positioned on the left side of the frame, holding the key in the lock. The background is slightly blurred, showing a window with light coming through.

7:15

AM

START EARLY

The day starts early for an effective owner/contractor. Getting to work before the business of the day starts allows him to make adequate preparation and stay ahead of his business – rather than the other way around.



7:20

Using the reported numbers from the day before, the manager can effectively make data-driven decisions about the day ahead. Use the **Daily Decision Report** on your flash drive to adjust the schedule if necessary, increase marketing efforts, and ensure that A/R and A/P are in line.

BY THE NUMBERS

Daily Decision Report - HVAC



Today's Date	06/21/2019		
		20	Working Days
		6	Remaining Working Days

Cash			
Cash in Bank	\$	6,500.00	
Invested Cash	\$	45,050.00	
	\$	51,550.00	Total Cash

Accounts Receivable			
Current	\$	35,000.00	
31-60 days	\$	11,000.00	
61-90 days	\$	15,550.00	
90+ days	\$	-	
	\$	61,550.00	Total Receivables

Accounts Payable - check box if discount is available			
Due Date <input type="checkbox"/>	06/15/2019	\$	11,000.00
Due Date <input checked="" type="checkbox"/>	06/30/2019	\$	5,000.00
Due Date <input type="checkbox"/>	07/30/2019	\$	275.00
Due Date <input checked="" type="checkbox"/>	07/30/2019	\$	555.00
Due Date <input type="checkbox"/>			
Due Date <input type="checkbox"/>			
Due Date <input type="checkbox"/>			
Due Date <input type="checkbox"/>			
		\$	16,830.00
			Total Payables

Replacements			
Monthly Budget	\$	100,000.00	
Actual Sales	\$	75,000.00	
MTD Pace	\$	70,000.00	\$ 5,000.00 Ahead/Behind

All Other			
Monthly Budget	\$	200,000.00	
Actual Sales	\$	95,000.00	
MTD Pace	\$	140,000.00	\$ (45,000.00) Ahead/Behind

Total			
Monthly Budget	\$	300,000.00	
Actual Sales	\$	170,000.00	
MTD Pace	\$	210,000.00	\$ (40,000.00) Ahead/Behind

Daily Decision Report - Plumbing



Today's Date	06/21/2019		
		20	Working Days
		6	Remaining Working Days

Cash			
Cash in Bank	\$	6,500.00	
Invested Cash	\$	45,050.00	
	\$	51,550.00	Total Cash

Accounts Receivable			
Current	\$	35,000.00	
31-60 days	\$	11,000.00	
61-90 days	\$	15,550.00	
90+ days	\$	-	
	\$	61,550.00	Total Receivables

Accounts Payable - check box if discount is available			
Due Date <input type="checkbox"/>	06/15/2019	\$	11,000.00
Due Date <input checked="" type="checkbox"/>	06/30/2019	\$	5,000.00
Due Date <input type="checkbox"/>	07/30/2019	\$	275.00
Due Date <input checked="" type="checkbox"/>	07/30/2019	\$	555.00
Due Date <input type="checkbox"/>			
Due Date <input type="checkbox"/>			
Due Date <input type="checkbox"/>			
Due Date <input type="checkbox"/>			
		\$	16,830.00
			Total Payables

Remodeling			
Monthly Budget	\$	100,000.00	
Actual Sales	\$	75,000.00	
MTD Pace	\$	70,000.00	\$ 5,000.00 Ahead/Behind

All Other			
Monthly Budget	\$	200,000.00	
Actual Sales	\$	95,000.00	
MTD Pace	\$	140,000.00	\$ (45,000.00) Ahead/Behind

Total			
Monthly Budget	\$	300,000.00	
Actual Sales	\$	170,000.00	
MTD Pace	\$	210,000.00	\$ (40,000.00) Ahead/Behind

Working Days
Month-to-date
Cash in the bank
Cash invested

Accounts Receivable

- Current
- 31-60
- 61-90
- 90+

Accounts Payable

- Discount/date
- Avoid late

BY TI

A blurred photograph of a crowd of people walking in a modern building hallway, creating a sense of motion and urgency. The background is a light-colored wall with a grid pattern.

IT'S ALL ABOUT PACE

Look at your Call Count Report to determine if **Emergency Marketing** is needed (always 1st). If projected revenue is down, take action.

Compare your completed replacement sales to your budgeted sales.

Compare your Month-to-date to your working days.

Look at all other sales.

Look at the total.



7:50

AM

A quick meeting with the troops helps you touch base and keep your finger on the pulse of the business. It's also a chance to hear about successes and challenges, reward your people, and give them access to you for questions or concerns.

THE HUMAN TOUCH



8:00

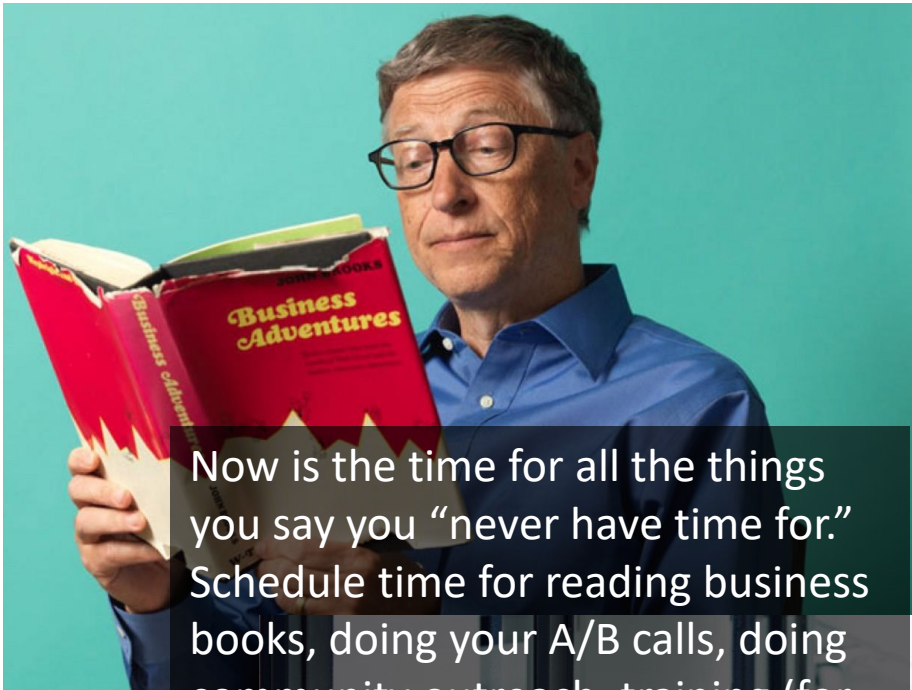
AM

Spend time coordinating with the other departments. If your scheduled calls are slim, now is the time for **Emergency Marketing** maneuvers. Also, now is a good time to “eat the frog” and get any unpleasant tasks out of the way. If all is running smoothly, pay your bills now, plan strategy, or take care of any miscellaneous business.

THE BIG PICTURE

12:00

PM



Now is the time for all the things you say you “never have time for.” Schedule time for reading business books, doing your A/B calls, doing community outreach, training (for yourself or for your team), and networking functions. Do everything you can during this time to grow your business. If you spend it running calls, there will be no growth, guaranteed.



FOCUS ON IMPROVEMENT

BUSINESS LIBRARY IDEAS

- **Traction:** *Gino Wickman*
- **One Thing:** *Gary Keller*
- **Power Of Consistency:** *Weldon Long*
- **Duct Tape Marketing:** *John Jantsch*
- **EntreLeadership:** *Dave Ramsey*
- **7 Habits Of Highly Effective People:** *Stephen Covey*
- **Positive Personality Profiles:** *Robert Rowland*
- **The Road Less Traveled:** *M. Scott Peck*
- **Business for the Glory of God:** *Wayne Grudem*
- **5 Love Languages:** *Gary Chapman*
- **The Millionaire Next Door:** *William Danko*
- **Millionaire Mind:** *Thomas J. Stanley*
- **The Birth Order Book:** *Kevin Leman*
- **As a Man Thinketh:** *James Allen*
- **How To Wins Friends and Influence People:** *Dale Carnegie*
- **Influence: The Psychology of Persuasion:** *Robert Cialdini*
- **Competitive Advantage:** *Michael Porter*
- **Emotional Intelligence:** *Daniel Coleman*
- **Moneyball: The Art of Winning an Unfair Game:** *Michael Lewis*
- **To Sell is Human:** *Daniel Pink*
- **Build an A Team:** *Whitney Johnson*
- **It's the Manager:** *Jim Clifton & Jim Harter*
- **HVAC Spells Wealth:** *Ron Smith*
- **The Power of Positive Pricing:** *Matt Michel*
- **Bumps on the Road to Riches:** *Jim Olsztynski*
- **The E-Myth:** *Michael E. Gerber*
- **The 21 Laws of Leadership:** *John C. Maxwell*
- **The E-myth Contractor:** *Michael E. Gerber*
- **The Ideal Team Player:** *Patrick Lencioni*
- **The Great Game of Business:** *Jack Stack*
- **Wired and Dangerous:** *Chip Bell*
- **21 Irrefutable Laws of Leadership:** *John Maxwell*
- **Profit First:** *Mike Michalowicz*
- **Leadership Gold:** *John Maxwell*
- **Leadershift:** *John Maxwell*
- **Grit:** *Angela Duckworth*
- **Give and Take:** *Adam Grant*
- **Drive:** *Dan Pink*
- **Linchpin:** *Seth Godin*
- **Good to Great:** *Jim Collins*
- **Great by Choice:** *Jim Collins*
- **Leadership and Self Deception:** *Arbinger Institute*
- **Tender Warrior:** *Stu Weber*

4:00

PM

At the end of the day, get the troops back together for any final “attaboys” or concerns. Check your numbers for the next day so there are no surprises. Do any necessary preparation for the next day’s projects. This way, tomorrow starts predictably, and is easier to schedule than today was. 😊

WRAPPING UP



A photograph of a family of three—a mother, a father, and a young child—reading a book together. The mother is on the left, looking towards the father and child. The father is on the right, smiling and looking down at the book. The child is sitting on the father's shoulders, also looking at the book. They are all wearing white shirts. The scene is lit with warm, soft light, suggesting a cozy evening at home.

6:00

PM

If you have any evening community outreach commitments, make sure to honor them. Otherwise, it's now time to spend with your family. Schedule this time, and don't let the demands of business rob you of the greatest pleasures in life - otherwise, what's the business for?

FAMILY TIME

You have to organize, organize, organize,
and build and build, and train and train,
so that there is a permanent, vibrant
structure of which people can be part.

Ralph E. Reed, Jr.



OBSTACLES THAT KEEP PEOPLE FROM DOING THEIR JOBS

- They don't know what to do
- They don't know how to do it
- They don't have time to do it
- **They don't think they should have to do it**

Refer back to policies and job descriptions.

If you don't have good, acknowledged job descriptions and policies, you have to rely on this:





OBSTACLES THAT KEEP PEOPLE FROM DOING THEIR JOBS

- They don't know what to do
- They don't know how to do it
- They don't have time to do it
- They don't think they should have to do it
- **They don't want to do it**

If you aren't fired with
enthusiasm, you will be
fired with enthusiasm.

Vince Lombardi

ACCOMPLISHING





**RECRUITING, HIRING
& FIRING**



Critical Steps to Effective Recruiting



**Know what
you're
looking for**



2



**Fill your
talent
pipeline like
your life
depends on it**

3

**Keep in
touch**

The image features a large, bold yellow number '3' on a dark red background on the left side. The right side of the image has a light blue background with a network of stylized human figures connected by thin lines, suggesting a social or professional network. A prominent diagonal line, possibly representing a path or a connection, runs across the network.

4


**Train your
hiring
managers**

5

**Look for
different
sources**

6

**Trust your
gut**

The background of the right side of the image features a network of stylized human figures. The figures are light blue and are connected by thin, light blue lines, suggesting a social or professional network. The overall aesthetic is clean and modern, with a light blue and white color palette.

7

**Make it a big
deal**

8

**Treat
applicants
like
customers**

DOES

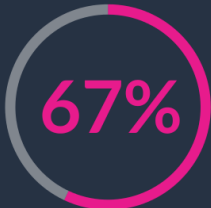


DIVERSITY

MATTER?

DIVERSITY RETURN ON INVESTMENT

According to LYFT



of candidates want to join a diverse team

Sixty seven percent of job seekers said that a diverse workforce is an important factor when evaluating companies and job offers.²



of employees want to prioritize diversity

Fifty seven percent of employees want their company to do more to increase diversity among its workforce.³



more likely to be innovation leaders

Inclusive companies are 1.7 times more likely to be innovation leaders in their market⁶



higher cash flow at inclusive companies

More inclusive companies have 2.3 times higher cash flow per employee over a three-year period.⁴



of diverse companies outperform homogenous ones

The most ethnically-diverse companies are 35% more likely to outperform the least ethnically-diverse companies.⁵



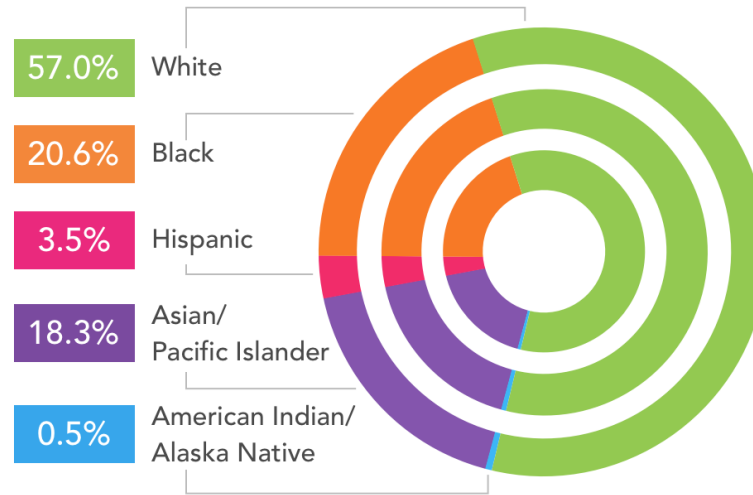
diverse companies are more likely to capture new markets

Diverse companies are seventy percent more likely to report that the firm captured a new market⁷

RACE, ETHNICITY, GENDER AND DISABILITY STATUS IN THE US

National Institute of Health
Office of Equity, Diversity and Inclusion

RACE & ETHNICITY



MALE

7,208

41.3%

FEMALE

10,238

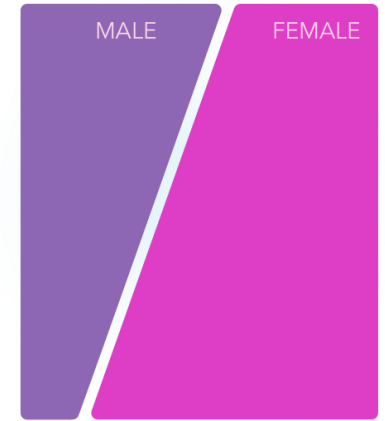
58.7%

GRAND TOTAL

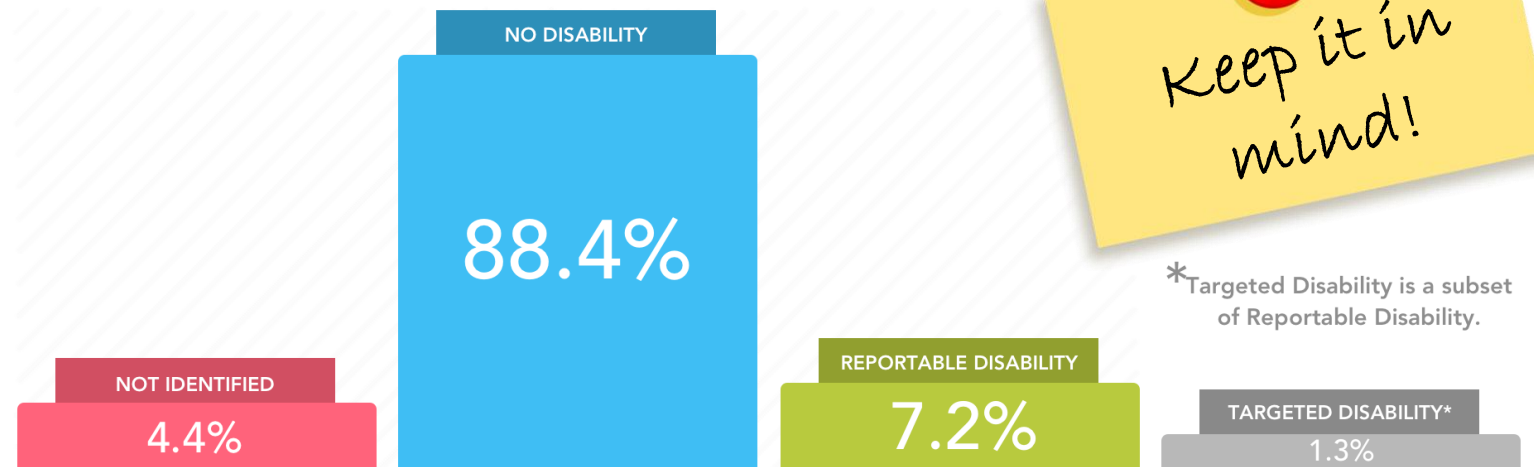
17,446

100.0%

SEX



DISABILITY STATUS



*Targeted Disability is a subset of Reportable Disability.

Consider Hiring Outside Your Geography





**MAYBE
YOU'RE NOT
ATTRACTIVE ENOUGH**

Consider higher pay

- Performance pay

Provide competitive benefits

- Health Insurance
- 401K
- Profit Sharing
- Vacation
- Education Reimbursement
- Career Growth

ATTRACTING QUALITY EMPLOYEES



Use Bonuses and Incentives as Motivators

The background features a stylized sunburst pattern of yellow and white rays emanating from behind a grey silhouette of a globe. In the center, there are two grey silhouettes of people: a man on the left with his hands on his hips, and a woman on the right with her hair blowing in the wind.

- Hiring Bonus
- Airplane Tickets
- Extra Vacation Days
- Fishing Gear, Hunting Gear, Golf Gear
- Health Club Membership
- Performance Recognition
- Exceptional Accomplishment
- Employee of the Month
- Employee of the Year
- Prizes for Winners

If pricing is correct, the more you pay in incentives, the more profit you are making!

A note on retention and career paths:

Career advancement
is important to

83%


of employees

But only

20%

are happy with the
way their employers
handle it

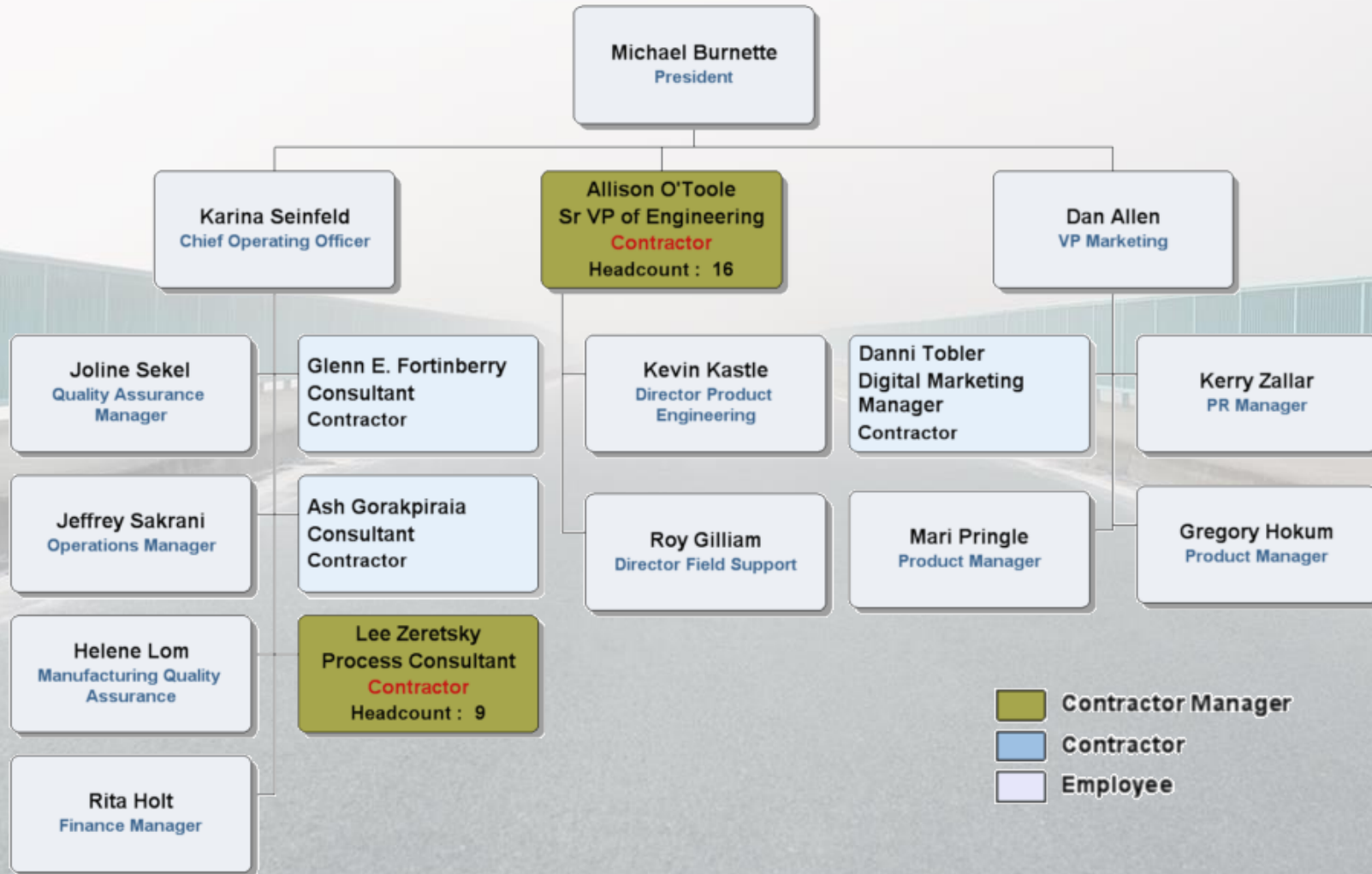




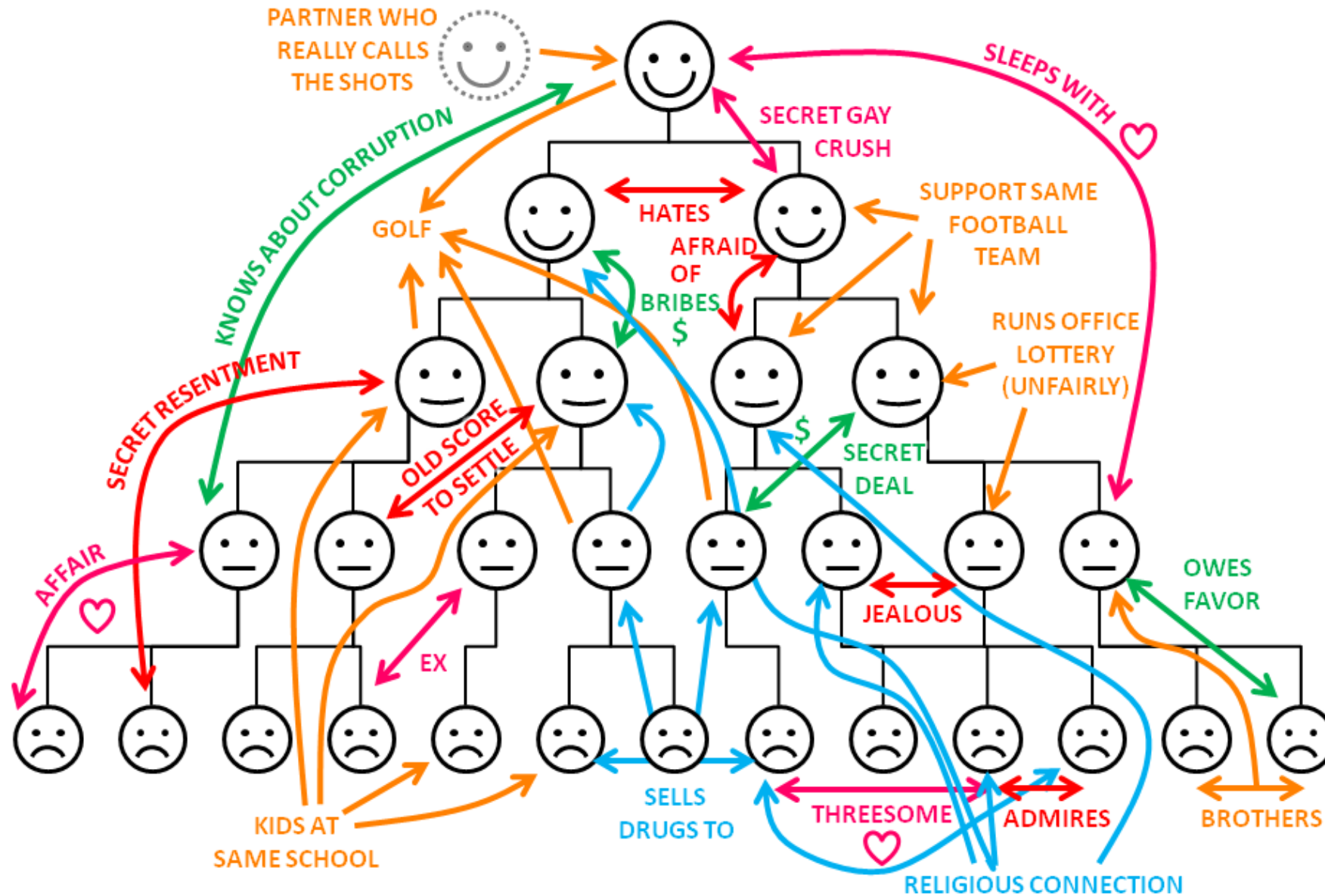
If your employees can't
see their future with your
company...

...they don't think they
have one.

The Organization Chart



REAL ORGANIZATION CHART





OBSTACLES THAT KEEP PEOPLE FROM DOING THEIR JOBS

- They don't know what to do
- They don't know how to do it
- They don't have time to do it
- They don't think they should have to do it
- They don't want to do it
- **It can't be done**



**UNREALISTIC
EXPECTATIONS
AHEAD**

Do I Really
Need This?

••• THE BIGGEST •••
MISTAKE

A SMALL BUSINESS
CAN MAKE IS

TO THINK

LIKE A SMALL BUSINESS

TAKEAWAYS



1. **Job Descriptions** – Create useful, complete and specific job descriptions. Download from the Download Center, use software, or download from the internet.
2. **Create Written Policies** – Again, get everything written down. Use the templates from the Download Center, create online or download from the internet.
3. **Create a Training Schedule** – Both for ongoing training and for times when business is slow. Sending people home randomly may temporarily help your bottom line, but could hurt retention in the long run.
4. **Incorporate Time Management** – Time management doesn't happen by accident. Consciously work on making the best use of time – for both you and your employees.
5. **Constant Recruitment with a Focus on Diversity** – Constantly be looking to improve your workforce, especially when things are slow.

QUESTIONS

Everybody's Got Them





Thank You



THE END

Thanks for attending this training.

Have a great day!