<u>ABC Fine Wine & Spirits</u> Best Practices:

- Bright Ideas program. Team members are able to submit any idea and then a committee evaluates the idea. If an idea is accepted, the team member gets a $25 or $50 reward. We recognize the good ideas in our company newsletter.
  – *Andy Abernathy*
- Jon Gordon's Positive University (http://www.positiveuniversity.com/)
- Regular phone conferences or calls with my entire team or on an individual basis. I initiate the calls and communication. Over communicate and follow up.
- I think creating somewhat of a family atmosphere with all team creates a sense of belonging. This can create an atmosphere where everybody has each other's backs aka supports one another regularly. Some examples would be group activities, group text where non-work things are shared, learning about other team member's spouses, children, grandchildren, etc., sharing successes and failures aka being vulnerable. The concept of being vulnerable with people from work is a new concept for me but I now believe it's the best way to create a cohesive team. To do this you must create a culture of trust which is not easy.
- Let your team know where they stand and encourage them to do the same with their team.

<u>Certified Slings</u> Best Practices:

- At the beginning of the year we (Denny/president, Connie/CFO, and myself) started meeting monthly via skype and in person with our service center leaders and reviewed their SC scorecard (the same format and scorecard we use at TeamStrength monthly meetings). It took a few months to get the team in the "rapid fire" mode of reviewing the monthly and YTD results along with upcoming and the last 30 goals/priorities. But now they all come prepared and ready to discuss in 15 minutes their SC results. I have found this process to keep the team on top of the key drivers that help them reach their expected goals. From my stand point with multiple off-site locations it is a great way and very efficient way, within three hours, to meet and talk about issues, results and goals with 10 leaders and at the same time continue to build on our relationship through communication and passion for success.
  – *Doug Worswick*
- Morning meeting or huddle with the entire team. Five to fifteen minutes of what is hot or needs to be accomplished.
- I use Basecamp to keep myself organized as well as keep track of projects involving different people and find it great for keeping everything in one place.
- Make sure each team member knows what our goal is and how important to the success of the team and the company their job is. When they don't do their job to the best of their ability the team/company suffers.
- I've recently starting using a pipeline management and customer profile system to build a long-term strategy with day-to-day goals. We've started building salesmen goals that aren't just "sell X dollars," but "generate X new customers" and "bring X customers back around from last year," because we know that generating X new customers and bringing back X customers from last year will generate and an average sales/customer of Y. Here's how we've done what we've done so far:
  - Build an image of your sales pipeline – new customers, returning customers, reactivated customers over a one, three, five year timeline.
  - Ask "where is the best growth potential?" – Retention rates? Reactivating old customers? Churning up new customers?

- Build a profile of your customers – Who sticks around and who doesn't? Why? Use that profile to direct resources to your "best growth" potentials.
- You always need new customers – take the profile you have to research new customers you're likely to be able to help and who are likely to stick around.
- Go from "cold calling" to "calling into a cold account" (TM *Predictable Sales*, don't remember the author).

<u>DiPasqua Enterprises, Inc.</u> Best Practices:

- How are we doing? This is always an important question when you have customers and want more of them. We get national research to see how the brand is doing, but then how do we compare to the rest of the country, or even the rest of the world? To stay on top of this we do two things: (1) Night shops are done just about every day by the development office. Restaurants are visited and a survey is filled out with data on the quality and quantity of the food, the service, and the facility. Photos are taken, and it is all score carded. (2) Local research. Once a year we commission Marshall Marketing to do research in our market. We customize the questions so we get a read on every attribute against each competitor. Examples include: cleanliness, quality of food, quantity of food, value for the money, atmosphere, convenience, health attributes, and variety. We are able to track these over time and put action plans against the areas of weakness. It is amazing to see our perceptions against the facts. Unfortunately sometimes there are large gaps.
  – Peter DiPasqua, Jr.
- Performance Pay. Manager's compensation plan incorporates incentives for productivity, food cost, and increasing sales. District Supervisors compensation plan motivates them for increase sales, profits, controlling food and labor costs, meeting ideal staffing goals, retaining managers and hourly team members, increasing customer ratings, decreasing negative customer comments, and remaining in compliance. Directors are motivated based on annual profit performance pay. The office team receives performance pay based on maintaining cost versus a company profit scale. Training is incentivized on retention, trainee feedback, trainee cost control, and trainee performance after graduation. HR's comp plan is comprised of recruiting goals and trainee successfully completing their working interview.
  – Kimberly Brooks
- Controlling costs – Secret Online Ordering – no customer in front of employee asking for "extra toppings – review formulas with employee – reward if accurate, explain the big picture for the company if each sub had extra toppings
- I use a weekly scorecard. Every week my supervisors see each other's key numbers, such as sales, labor and food costs and compare them to company averages.
- Communication is the central in our line of work. Furthermore, I like to create/provide a light-hearted atmosphere for all my stakeholders. In turn, clients are more comfortable and prepared to trust me.

<u>Entrenext Ventures</u> Best Practices:

- Your first job is to help your coworkers, your second job is to do your own job.
  – Jonathan Taylor

<u>Etech Events</u> Best Practices:

- Open communication with everyone at the company. We rally together and truly all seem to get along and work well together. We "try" to follow the same processes on every event so we can find small ways to improve and become more profitable. We have created new tools

within MOLE to create processes so we can tell the status of each order and determine the profitability of each event when all of the information is entered into the orders correctly. MOLE is our process and makes Etech very efficient.
– Cliff Ferris

- Before setting up any part of an event, the crew and I sit in a roundtable and discuss expectations, concerns, documentation, and any other pertinent items that the team may want to know or discuss.
- Every Monday morning we meet as a team. We plan and coordinate our weeks together placing our schedule on personal dry erase weekday calendars. Then on Fridays we recap on how the week went and what was/was not accomplished.
- My best practice is transparency. If a client asks me something that I can't immediately answer, I let them know that I've heard their request and I will need some time to find a solution. The same goes for my internal team. I find that in general, most people would rather hear you say, "Good question, let me find out and get back to you," than to feel like they are being ignored.
- Daily meetings and project follow-up. Constructive criticism and verbal reinforcement of good work.
- I have daily meetings with those who report directly to me. They are very informal, usually around 15 minutes, and sometimes even done in the breakroom while we get our coffee. It is just a way to make sure we are all on the same page and working in the same direction. It's a back and forth discussion, not a lecture, and we usually come up with strategies on how to accomplish goals together.
- Humor and rampant sarcasm

<u>Fannie Hillman and Associates</u> Best Practices:

- Weekly sales meetings, monthly and quarterly meetings with incentive prizes. We give our tickets for specific activities so the more tickets you get the better chance of winning.
  – Scott Hillman

<u>Gallagher Promotional Products</u> Best Practices:

- Started an Employee Advisory Committee (originally called the Positive Change Committee) consisting of seven non-management team members from various departments that met and discussed topics and ideas that would enhance the work environment. These ideas were then presented to me or a member of the management team. The committee has met four times since October and has brought forth various ideas for team building, employee engagement and environmental enhancements. Members were chosen based on their positivity and desire to affect change and they have expressed appreciation in being a part of this committee.
  – Brad Carlson
- Open communication with each employee. Allowing everyone to be able to bring ideas or suggestions to make a process better, make them more productive or efficient, or make the customer's experience better overall, is something I really try hard to implore on my teams. Then taking these ideas and truly evaluating them, to see if they are viable, is key. Actually including the person or team in the evaluation process allows them to truly understand the end result and feel motivated to continue giving ideas.
- The "You make the difference program" allows anyone in the company to recognize another employee or manager. This empowers everyone to positively reinforce their colleagues.

- Our company has always struggled with a disconnect between our sales and administrative departments. The disparity we made even greater a few years ago when our sales department moved into a separate office space a short walk from the main admin building. In an effort to bring the teams together and give individuals a greater understanding of the roles of their coworkers we created a program called Desk Share. We set up extra work stations in the two departments with the most tension and implemented a rotation schedule where each employee is assigned a day(s) to work in the alternate department. Managers also take part, although they have no set rotation schedule. The program has helped to open the lines of communication and also allowed us to identify obsolete practices and training issues. It gives employees a forum to ask questions face to face rather than use technology and helps develop trust between departments. The program was met with strong resistance by some tenured employees but once they completed their first rotation those same employees asked to participate more frequently.
- Employee Performance Peer Review: This is a part of our 30/60/90 Day Employee Evaluation process. Feedback from the peers is given during the probation period; peers feel they are part of the hiring process; peers have a vehicle to communicate with their manager how the new employee is performing and how the employees fits in with the culture; management is able to see areas for additional training or improvement

<u>Hammond Electronics</u> Best Practices:

- Productivity bonus
  – John Hammond

<u>Launch That</u> Best Practices:

- 5-15s; Intranet Blog Updates; Monthly Report/Monthly meeting; scrum projects
  – David Palombo
- We usually hand out priority lists on a weekly basis for the team; I've given my team what I call a "catch up" week that allows them to catch up with some of the priorities that have been on the list for a few weeks. I'm also considering doing some sort of a creative week or DIY week where I allow them to work on priorities that they feel are important to them.
- This year we implemented KPI's that the team is able to see how they are performing compared to their peers. It has made a marked difference in effectiveness of the team in performing their job and challenges them to improve their performance. It makes their job a bit more stressful but I feel that it has been very beneficial in performance and accountability of the team as a whole.
- Plan, execute, and review. Emphasize that review is where learning and growth occurs. As an educator the planning falls under my responsibilities and the execution is the learner.
- I like to do a morning check-in with all my direct reports. These don't always happen every single day because of varied schedules and meetings, but I like my team to know that I am paying attention and also that I am available to for them what needs to be done to help them accomplish things. This can be negotiating with another exec, straightening out confusion among managers or making sure we are all on the same page about objectives, etc. I also consistently buy lunch and breakfast for people. Most people don't expect it, and everyone appreciates a free meal. It's cost effective (most are on my own dime) and helps me get people go to the wall for me when I need something done.
- Daily stand up meetings. We are not allowed to sit down and everyone speaks about what they accomplished the day before, what they are working on today and any roadblocks they

have hit and need help with. Each person speaks for about two to three minutes in order to keep it short. Additionally this is where everyone from different departments can hear what each other are working on so they can prep for when it will hit their plate. This has made us much more effective and improved communication across members of the team that otherwise would not talk to one another. Over time I have worked myself out of those meetings and my team continues to use them as department leads and with their specific departments as well.

- Linkbuilder Biweekly Competitions – allows everyone on the team to see how others are doing and strive to be better. Bonuses tied to the competition. Individual goals and team goals. Slack team channels. This allows team members to share successes, new ideas and relevant articles.

<u>Lowndes, Drosdick, Doster, Kantor & Reed PA</u> Best Practices:

- We emphasize following the sunset rule. We subscribe to the thought that it is our job to make their job easier.
- Buy lunch every couple of months for staff in my dept. Delegate tasks.

<u>MarketLauncher, Inc.</u> Best Practices:

- Started an "Operations Update" page on Zoho (internal internet communication tool – like a Facebook for internal communications). Post an internal blog and then typically reinforce that with additional communications – lunch-n-learns, announcements, updates, examples of the topic in motion, results.
  – Tricia Washington
- We set a theme this year to focus on the client's success (our motto: "It's not about making the clients happy, it's about making them successful"). We do a quarterly round of meetings with key clients, presenting a summary of best practices we have identified from work we've completed across our client base. We make recommendations on how we think those best practices might apply to their campaign. We use these meetings as a way to illustrate our commitment to the client's success, solicit feedback on progress to date and strategize on how we can have a bigger impact in the weeks/months ahead on their campaign.
  – Lara Triozzi
- More than half of MarketLauncher's team members are an independent contractor base. The contractors are an integral piece of our team – they are frontline sales and marketing professionals – seasoned and we want to create a "we" culture and align our core values. We recently split our communication firm updates through an all Employee Call held quarterly/all consultant call held quarterly – allows us to provide highlights relevant to the consultants – a prat of the team – yet providing them the info they need.
- We used to work on a quarterly bases for every project and this year implemented real time tracking to track metrics based on full length of the project, not just the quarter. This has given us better visibility into the performance of an account and also helps us to prioritize based on the real time of the project vs starting over each quarter.

<u>Modern Plumbing Industries</u> Best Practices:

- Department heads are involved in building budget. We then forecast sales and set profit goals. The performance/results are reviewed monthly and shared with foreman as well as the GP% and labor hours in their jobs, educating them in the numbers.
  – Charles Bracco

- ➢ (a) 4:00 PM daily huddle with my project managers to plan out the next day's activities. (b) Established a morale committee, keep all employees engaged in how we do business.
- ➢ Auditing. As a team we go over every email and piece of paper that comes in to assure that each item is handled to resolution. Each of the team members is responsible for a different task. Such as following up with the customer, ordering parts, invoicing, etc. We are developing job descriptions and standard practices for consistency.
- ➢ Everybody has the same set of daily goals. What we want to accomplish today. Therefore all of us have the same objective. And the team has to work together to achieve them. So our success is a group effort. (Team Huddle)
- ➢ Subcontractor & GC meet and greet targeted group.
- ➢ My attitude.
- ➢ I like to plan my day while driving to work. This allows me time to recognize what needs to be accomplished throughout the day and leads to higher productivity.
- ➢ Three week look ahead.

<u>NAI RealVest</u> Best Practices:

- ➢ Shoot for the stars – an annual revenue program/game that is communicated every week and celebrated every quarter. Every week I send an update of where we are in relation to our revenue goals. It's a graph showing a rocket ship (hopefully) flying over a planet. If we're in a space or at least on the surface of the planet we're doing good. If we're in the planet's craters we're below our goal. I also include any significant wins/commissions we received the past week. It's a quick way for everybody to know how the company is doing compared to our goals and recognize individual success every week. If we are above the craters at the end of the quarter we have a party.
  – Patrick Mahoney
- ➢ Periodic production contests lasting no longer than a quarter. Our sales team is highly competitive and winning a contest results in significant recognition.
- ➢ Using online marketing applications and automation technology for the creation of collateral, websites, and reports.

<u>Oros Risk Solutions, LLC.</u> Best Practices:

- ➢ Practice 30-second commercials – Years ago, a client of ours did an exercise. They had each of their client-facing team members (about 20 people) record an introduction of the company. When they played the video back to the team, they were shocked to realize every single person introduced the company differently. While some variation was simply due to personal language choices, other introductions were quite off base – talking about old strategies and using outdated messaging. Having a consistent 30-second commercial allows you to ensure that prospects are hearing the same message, which is aligned with your company's strategy.
  – Jarred Blits

<u>Planet Fitness</u> Best Practices:

- ➢ We began with a SWOT Analysis at an Executive Team Meeting moderated by Carol Hull to determine the areas for opportunity and improvement within the organization. We then pulled together an Executive Task Force that is charged with taking on the top three to four priorities. The Task Force assembled several subcommittees comprised of four to five team members from all levels of the company to engage in four month projects and take

ownership of one of the opportunities outlined in the SWOT. We are able to incorporate the insights of all of our team and provide them with a purpose larger than themselves. At the same time we strengthen the Company in areas that need attention but have been postponed because of limited resources. Participants are honored to take on the challenges knowing that they were chosen for this role and it encourages renewed engagement in the company.
– *Shane McGuiness*

- Streamlining the 'teamwork' – Assigned certain aspects of task to individuals, gives them better sense of ownership and still sharing/collaborating with co-workers to come together. Happier and more efficient. (Recruiting process – instead of assigned)
- Improved productivity from new software implementation to Dynamics GP. Areas of improvement include: uploading bank activity for electronic bank reconciliation; uploading journal entries from various external sources – ADP, Operating System; move to paperless invoice environment; improved financial reporting; and improved budgeting capabilities.
- Regular team meetings as well as cross functional collaboration. I find it informative to attend the meetings of different departments to get a better understanding of the business, the roles of each department, their processes, and how they interconnect. It allows one to see things from different perspectives and can shed light on potential problems and solutions. We recently established a cross functional task force to explore areas of improvement and implement company initiatives. The information we have gathered has been invaluable.
- Sending a follow-up email after you have had a conversation face-to-face with an employee or team member. This will help recap the conversation you had in writing so there was no confusion.
- Creation of a marketing committee made up of club staff members, street team comprised of club staff members, two weekly check-ins with my supervisor, huddle meetings with management, operations and marketing to ensure we are working towards a common goal.
- Effective communication. Celebrating accomplishments with praise. Admonishing employees consistently/in a timely manner. Giving and receiving clear/concise feedback, while setting further expectations. Most importantly – being reachable or returning calls with-in the hour.
- We implemented a program where our staff members are awarded points for exceptional customer service/dealing with difficult customers properly/taking initiative to improve the facility/coming up with ideas to make their job more efficient or improve a process or procedure… and they use those points for merchandise, movie tickets, gift cards, etc.
- Timely and regular communication setting, agreeing upon and continuously reviewing goals.
- Being in the clubs more working side by side with the club manager.
- Getting into the club, working with my management team.
- Open book policy. Transparency.

<u>Puff 'n Stuff Catering and Events</u> Best Practices:

- We survey every event team electronically after their event in order to extract customer satisfaction, product excellence, equipment usage.
  – *Heather Hofmann*
- I realize that the world owes me nothing. I create my destiny every day and I work focused and hard.
  – *Warren Dietel*
- Synergy – the whole is greater than the sum of its parts

<u>R.C. Stevens Construction Co.</u> Best Practices:

- We empower our people! I, as the Owner, will offer guidelines to operate within but they have the ability to act/react in the best interest for the company and the client. Must keep in mind that every project we build is a major project for that particular client. The type of work we perform is typically within an operating plant or facility where the actual work and decisions associated with them are extremely fluid and our team needs to have the support and guidance to make those calls quickly and as needed.
  – *Tim Keating*
- We implemented a web-based subcontractor ACH payment system that improves efficiencies by reducing the A/P flow and increasing turnaround time in project management. It reduced the accounting department employee count; it protects us and our owners through compliance tracking of lien releases, insurance and licensing. And it increases timeliness of payments to our subcontractors thereby increasing their satisfaction.

<u>SureFire Systems, Inc.</u> Best Practices:

- We use Harvest (harvestapp.com) to track all time for our employees, and feed this data directly into our payroll system. Employees only get paid for the time they have logged in Harvest, and they have to be detailed in who and what they spent on time on. This practice alone increased our client billing almost 35% per month.
  – *Richard F. Schilke*
- Document everything. Having a reference for every past project/issues/correspondence is a god-send for quickly identifying new issues. It saves tremendous time when a new issue crops up that is identical to something previously done, and saves on repeated research and work. Of course this hinges on having a resource to rapidly scour through all this documentation.
- Treat clients, teammates, sales prospects, your boss, as you wish to be treated. So many folks discuss this, but never apply it to their professional lives (just call Verizon with a billing issue if you need an example). My job has always been to give our clients the perception that SureFire cares (without increasing costs). Treating every call as if I'm on the other side helps us do that.

<u>Universal Roof and Contracting</u> and <u>Renewal by Anderson</u> Best Practices:

- Kickoff meeting with the entire staff on the first of the year to share vision and bi-monthly to see how we are doing.
  – *Jared Mellick*
- Adopting a true methodology for sales to appointment handling. Making sure that methodology is adhered to at every step from taking and settling a lead, to sales, follow-up and installation.
- I have weekly meeting with each employees in order to go over job costs, problems from the week before, how to resolve those issues, and just bond with employees. I make sure that the employees are comfortable around me, and I let them know that I am here for them if they need me. I also do quarterly team building activities, such as Dave and Busters or Paintballing. It is an effective way for employees to feel less stressed.