The Ideal Way to Strategize

By Susan Schilke; June 1, 2019

How do you find and keep the best team members? How do you compete against your competitors for customers? How do you most effectively manage your time and invest in the right activities? Strategic answers to all of these can be found by starting with the ideal.

The dictionary says, "*An **ideal** is a model of something perfect or without equal. As an adjective, **ideal** describes this ultimate standard for excellence, or something that exists only as an idea.*"

For TeamStrength member companies, defining the ideal can be an invaluable tool. For years, we've encouraged leaders to use Ben Gill's Ideal Work Week to identify the most effective time management strategies. You simply create a work-week schedule by placing the most valuable, high-impact activities into an ideal week's calendar in balance with the regular demands. We find leaders will include things like networking lunches, client relationship building, stay interviews and time for planning and innovation in an 'ideal' week. When they compare this to what's filling up their calendars now, they realize they need to work to plug in these activities first – "schedule your priorities, don't prioritize your schedule," as Stephen Covey said.

In our 2019 focus on strategy we're addressing the big question – how do you compete and win for customers and team members? Some answers to improving your client acquisition and retention and your employee recruiting and retention can be found by taking time to analyze the 'ideal' in these categories.

Here's how you do it:

1. Identify your category – the ideal customer for a specific product or service offering; or the ideal employee, either overall or for a specific role or department.
2. Because TeamStrength members are all established, successful companies, the analysis starts with your own data. So use these questions to start to build your 'ideal' profile:
   a. Who are our best performers and likely to grow (stars in the Performance-Potential Matrix)?
   b. Why do we love them?
   c. Why do they love us? (surveys are great to find out directly from the source)
   d. How did we find them or how did they find us?
   e. What are their common traits – for clients – size, scope of business, depth of the relationship, frequency of communication, type of client, etc.? For employees – strengths, experience, alignment to core values, work ethic, etc.?
3. Flip this for more information and apply similar questions to the other end of the spectrum:
   a. Who are some of our current or past wrong-fit customers or team members?
   b. What was our primary challenge with them?
   c. What did they not like about us?
   d. Similar to above – what are the common traits among those who don't fit? What do the businesses, contacts, team members have in common from this category?
4. Take these answers and build your profile of the ideal by listing the element you want and traits you'd like to avoid for alignment. Get a clear, concise bulleted list of 8 to 10 key things that show consistent results on both sides of the spectrum.
5. Work with your team to develop strategies based on these ideal profiles.
   a. How do we keep them?
   b. How do we find more of them?

      c. How do we identify the ideal (and the potential wrong-fit) early?
6. For example, when we look at TeamStrength members we find the ideal member:
      a. Is looking to improve their leadership and their company
      b. Has a company that has achieved success and is looking to get to the next level (not a start-up or turnaround)
      c. Is partner or majority shareholder of a company over $5 million in revenue
      d. Has established a clear position in the market(s) they participate in that creates future growth opportunities
      e. Takes a collaborative approach to decision making and values others' input
      f. Effectively identifies and presents tough decisions and challenges to their group
      g. Shares thoughtful, honest, direct feedback on their fellow members' issues
      h. Sets their ego aside and doesn't try to be the smartest person in the room
      i. Demonstrates a commitment to their fellow members and meetings
      j. Modifies their decisions and direction based on input from their group to increase their company's success

We actively work to select leaders based on this model, and our interview and selection process is designed to find members that best align to our 'ideal member profile.'

I recently worked with a member on an ideal client profile, and they've used this to modify existing relationships, avoid potential wrong-fits and actively seek out more of their ideal. Take this model to your next strategic meeting and collaborate with your leaders to have the same impact!

Whether you're mastering time management, or working to grow your client base or improve your team, use this worksheet and begin with the ideal in mind!