

How Many #1 Priorities?

Yikes! There are a bazillion things to do and all of them are a big fat emergency for someone who is important to you. It can be overwhelming and downright paralyzing for some.

Normal But Not Optimal

What usually happens at work when we have a lot of pressing matters that all command our immediate attention is that we choose priorities like this:

- 1) It is highly visible to an influential client and/or someone in management's stratosphere, so it is therefore at the top of the list. No choices felt here.
- 2) It can be acknowledged with a quick response that often entails re-directing the requestor to another party for resolution or assistance. Hot potato.
- 3) It can be done quickly and checked off the To Do list. This is somewhat satisfying because it reduces the sheer number of items clawing for one's attention, even if it isn't among the more important items on the list. No real sense of accomplishment.
- 4) It gets someone who keeps pressing (boss, co-worker, partner or client) off of one's back. Just do it.
- 5) It's maintenance work that is familiar, or routine. Comfort zone stuff.
- 6) It is a big, new, or different assignment that calls on people to think or act with fresh perspectives. Often quite uncomfortable.
- 7) Something we really like to do.

The above demonstrates classic work patterns that preclude innovation and honest communication. It is an approach preferred by those who don't like the idea of living in a different paradigm. It promotes comfort in a flawed present rather than a better future. It's the squeaky wheel syndrome. An excuse to ignore what quite possibly matters most by relinquishing control of our own plans to accommodate

everyone else's agenda. In essence, becoming reactive versus proactive: puppet vs. puppeteer.

Admittedly, this is what is expected of many people at work, and to be different would be to jeopardize job security. But for companies with a desire to grow and flourish, we believe there needs to be more considerate planning and dialogue.

Can we invert the list so that what we attack first on our priority list is something we would actually enjoy doing? More often than you would think. The idea, as we have oft alluded, is to garner some understanding and interest in the goal(s) so that one's role is identified in a way that his or her unique contributions are measurable, noticeable, and how they can be rewarding. To encourage and include input and feedback *before* the New Great Plan is implemented is to assure *much* greater results.

Everyone has ideas, but not everyone is asked. The worst corporate sin, we think, is that few managers actually ask their co-workers to explain the difference between good and great and come to a mutual agreement. It is almost like telling staff that it is preferable to be indifferent than to make a difference.

It's All About the Impact

As Project Managers, we like to plan. But to do it well, especially if you don't often manage projects, means to gauge impacts to every conceivable population that the initiative affects.

Having a tidy list of tasks in a timeline doesn't cut it. This is necessary, but it isn't everything. Good planning and analysis will help everyone see what and who will be impacted. This may be second nature to many in the project management world, but it is better articulated if plotted in a matrix that can be shared and discussed.

To that end, we have created the enclosed supplement to this edition of Light pArticles. On one side are the business drivers and on the other side, the people drivers. Both are crucial to keep in mind before launching the next Big Idea. We hope it is helpful to you and your constituents. Let us know.



Last But Not Least

Whereas we believe that most people are quite adept at maintaining professional decorum when at work, there is no denying that one's private joys and stressors can shape attention levels and work quality. Motivation is not necessarily heightened when one's butt is ensconced in a swivel chair instead of a recliner. To be good humans, it is essential to understand and respect the major life events and priorities of co-workers. For planning purposes, it is also essential. If you are aware of a colleague's sincere desire to move to Montana, wouldn't you consider and discuss it before divvying up duties? If you see that someone tends to cut corners or is distracted would you not find out why before making changes? If there is a promising new hire you don't know versus an existing co-worker whose flaws are already known, do you give the unknown person the better opportunity? These are critical things to ponder.

Setting priorities means planning. Working is the execution of plans. Try to plot priorities thoughtfully, or they might plot you.

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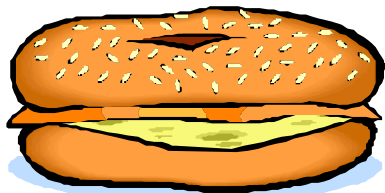
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Really good advertising is memorable. Great advertising is memorable and true. *Snap, crackle and pop* was true. *I've fallen and I can't get up* is a distinct possibility, especially with the upcoming holiday parties. So, too: *I can't believe I ate the whole thing* and *Plop, plop, fizz fizz...oh what a relief it is*. But quips such as *Quality is job one* (Ford) was a goal, perhaps, but not a firm reality for many.

Advertising and tag lines, by intent, are assertions—promises. They should not be such an esoteric string of words that the value of doing business with the company is as elusive as finding one's pantaloons the morning after the aforementioned bash. Advertising should not be a sweeping proclamation unless every single employee can embrace it and deliver it. Advertising should be a statement—not a concept.

The thing that is wrong with advertising is that clever campaigns are devised by the Marketing people, but that the people in the factory, back office, on the phone or at the counter were neither trained nor consulted in any part of the "promise". It drives us nuts.

Company mottos, slogans and subtitles that state some elevated level of prosperity or quality of life are good, if someone can explain them to the average person. Our own tag line—*Visions that make work better*—conveys that we think about and see how work can be improved. It fits with our company name—Business Insights. We live it and breathe it. We always keep it in mind when we are with clients, because it is what we say we do. Is this so difficult for big business to get? C'mon, monoliths of commerce—there's a new year coming. Take stock of what you

say you do and find out if your employees can express exactly what your assertion means in terms of their daily work. *Then* develop a brainy statement of commitment to your patrons. But wait: before making it into a catchy logo and saying, take it to the staff. Create dialogue; get input. How does it resonate? How does a person need to behave to make the promise a reality for the customer? How will a client know if what they've experienced embodies the proclaimed value proposition?

Lastly, try it out on others before going public. Will people remember your tag line as something that speaks of your company's practices or just as witty marketing gimmick with no teeth? You want people to take a bite and like it; to chew on it a bit—to enjoy the experience. To paraphrase the late John Lennon, give beef a chance.

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BIG DESK / LITTLE CUBE:

(a look at the varied perspectives of managers and employees)

The Customer Complaint

Companies that really care about customer service have established protocols for handling customer complaints. At the late great First Interstate Bank, any complaint received—whether by phone, letter or in pulsating flesh—was to be acknowledged within 24 hours and a date for resolution was to be set (typically within another 48 hours). Letters and issues were tracked and follow-up occurred.

Might we remind everyone out there that a client's issue is an opportunity to reveal chinks in the proverbial procedural armor? To get a sense of what works and what doesn't and make corrections before the next incident?



We don't believe the customer is *always* right—but we do think every customer *has the right* to be heard and to receive the courtesy of a full and timely response. This is one time that we think centralization is a grand idea.

Back in our Home Savings days, we saw first hand what happened to customer letters—someone made the ill-fated decision to delegate them to *one* person for follow-up and response. That one person (hi, Jamie!) already had a fulltime set of responsibilities. The existing backlog was unceremoniously dumped on her, and just getting the volume down to *last month's* complaints was a big achievement. Nor was any announcement made that the cooperation of others would be required: it was a losing battle. Nobody at the top really gave a bleep, except that they now had someone outside of their own offices to unload the work upon.

Isn't customer retention important anymore? Feedback, even if negative, is at the heart of any company's retention efforts. Clients that take the time to pursue some recourse or just an explanation are at the very least deserving

of high level attention—not the Hot Potato Approach.

BIG DESK PEOPLE

As your customer base expands, so should the staff dedicated to their needs. Complaints handled expeditiously and promptly will do more to foster loyalty than mass-mailed "We love our customer" notes. Surveys are too late and too impersonal.

You should know every kind of complaint and the time from receipt to resolution. This kind of tracking reveals quality trends and opens avenues for improvements in all areas of operation. If you don't know for sure that your clients have the ear of a professional crew dedicated exclusively to service *and* if you don't periodically get involved yourself, shame on you.

Little Cube Dwellers

"Duck, Cover and Roll" is for real fire, not the flames of customer ire. If you are first to receive the blast of dissatisfaction, DO NOT look first for safe haven, but stand up and take it. Even if it is not your fault and you had nothing to do with the snafu, you are still your whole company in the eyes and ears of the client at the moment of confrontation. Be the first to set the tone by telling the client what you intend to do and make a promise to call him or her back by the next day with the status, if it cannot be fixed then and there. Save a customer. Maybe you'll get a promotion, maybe not. But you'll feel darned good about it. * * * * *

Light Touches

Service Extras That Linger Long After the Experience

A GREAT DENTAL IMPRESSION!

We love Dr. Calvin Chen and his staff in Montebello, CA! As a group, they are a terrific bunch—they work hard, it is delightfully evident that they like and respect one another, and they really go the extra mile for patients. Indeed, they put a gleam in your smile without even being there.

Recently, I called to make an appointment for a routine cleaning with Helen, my favorite hygienist. **Dee**, who manages the schedule, knew that Helen was about to embark on a leave of absence and had no remaining openings. In an act of true thoughtfulness and client dedication, Dee relinquished her own appointment with Helen for me. Wow—**how very nice**, we thought.

But there's more. The week before the scheduled cleaning, I received a call from

Dr. Chen himself. He left a message with his personal cell phone number.

Dr. Chen wanted me to know that Helen had unfortunately needed to escalate her leave plans due to a family issue—and that she would not be there for my appointment. Further, he wanted to assure me that he was actively interviewing qualified replacements and that he would have someone of Helen's skill level in place by the day of my appointment. He just didn't want me to be surprised when I showed up with my polluted pearlies. Incredible!

This is the epitome of service. We are very grateful for people like Dr. Chen, Dee, Norma, Alma and the whole office for bucking the trend. It is an absolute pleasure to go to my dentist's office....

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pArticle Piques

Irksome iotas of service that cost : AUTOMATIC LOBOTOMY

For those of us who remember the analog days (think of a wind-up clock versus a digital one that needs electricity), it is second nature to know what to do when the power goes out. However, for many of today's workers, there is too much reliance on technology to do the thinking part of a transaction. When the power goes out, so, apparently, do the synapses of brain cells.

Big companies all have contingency plans for power outages at the IT level. But have they instructed people facing the customers with the manual process that is required to conduct business in the dark? Nope—not with any consistency. Yet natural and manmade calamities seem to occur with increasing regularity. Instead of knowing to locate a pen and a piece of paper, it is as if the service giver's lights went out with the ones overhead.

Perhaps the concept of manual labor needs an introduction. We bankers of old can remember how to take a deposit or cash a

check without the benefits of CRTs, magnetic strips and data lines. It wasn't difficult: you wrote it down on whatever form was needed.

Not long ago, we were in an office supply/technology store. The power was **not** out, but the terminals that facilitated credit card purchases were down. The young person at the checkout counter was completely clueless. "You'll have to pay cash or come back later," was the ultimatum given, "our system is down." So, we were out. The idea of calling in the transaction was dismissed.

So, too, was the frustration encountered when we needed to special order printer parts and the store clerk advised us that their computers were offline—we were told to go back to our offices and order from our own computers. Yikes!

It just shouldn't be that big of a mystery for retailers and service providers to spend a little bit of time to teach employees that they can actually do business without a keystroke of some kind. Let's bring back THINKING as a service concept. It may convince customers to come back.



Warm Tips

Reheating some old principles to succeed in new times

Carlos Santana Rocks!

Aside from the fact that we dig his music, Carlos Santana has an incredible talent for staying the course—being true to his values—and for being flexible. Business managers could learn a lot from that simple practice.

In an interview published November 6, 2005 by USA Weekend, the 58-year-old artist of 36 remarkable recording years offered the following wisdom:

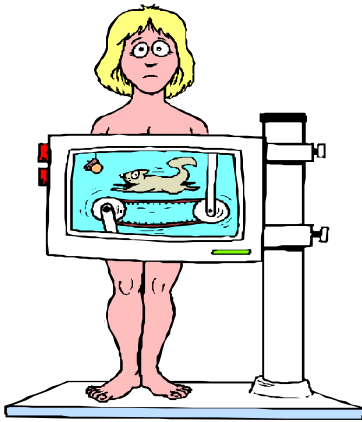
There's entertainment ...and there's music:

"Entertainment is watching a bear ride a motorcycle or a clown juggling balls. They both deal with balance, and I give credit to the bear and the clown. But music is about the sweet balance of human emotion and elevating consciousness."

Then vs. now: We had imagination: "A couple of years ago my son asked me, 'What did you have then that we don't have now?' I said, 'You have computers that can change musical keys and keep the same tempo. That blows my mind. What we had, though, was imagination. Turn off your computer and your TV, put away the Nintendo and Pro Tools. Get back to your heart, your fingers and your imagination, and the other stuff will make more sense to you.'"

How does this apply to business? All of the automation in the world will not replace the human mind. There is no love, no triumph, no esteem associated with technology. It just does the job it is told to do. In human terms, that is a "C", or "Meets Expectations". We think people still hold the key to greatness—but they sometimes need encouragement to be people, not techno bots.

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LC on Jury Duty

Having just served 7 days of jurist prudence for a whopping \$15 daily stipend, I have to say that for businesspeople, it is a **must-do**.

It was better than any group decision-making simulation exercise, such as being stuck in the desert after a plane crash or becoming stranded on the moon. This was the real deal: trapped in a room of alleged peers to make a set of serious conclusions that affect the lives of many. It is an excellent corollary for business meetings in that every opinion carries equal weight, regardless of experience, status, background, etc. What a great concept! Give everyone the same set of details and make them think! Respect them and listen! Assure that each person receives information and understands it! Discuss pros and cons! Decide as a unit.

There *is* one giant difference from a meeting, though—there is a profound determination to reach a verdict that one can stick with **for-**

Insider Insights
Thoughts and News Items We Felt Like Sharing

ever. To be able to sleep at night feeling sure of one's part in the lives of others. Do you see what I see here? The notion that decisions made in unity will be upheld, supported, and defended as the absolute best thing that twelve different people can collectively agree to with absolute conviction seems very powerful—at least to me. Can we use the practices of the courtroom in the conference room? Absolutely.

The Best Part

Aside from the awesome responsibility of a verdict, one gets to meet people and engage in dialogue rich with varied perspectives. The **Honorable John Torribio** was the *best* of judges. Quite interested in efficiency without compromise to quality. Great sense of humor. And get this: he sent a letter of thanks to each juror! His staff, Tony, Michelle and Connie were also terrific and fun. The jury was dynamic and dedicated. I was honored to find new friends, business opportunities and ideas. I loved the whole experience.

In this case, I heard about a great practice used by **Jacobs Engineering**. **Mary Ann Wright**, Marketing Coordinator for this global firm, shared that *all* meetings begin with a **Safety Minute**. One person is assigned in advance to provide a Safety Minute at every meeting. Something small, like "be sure to change your windshield wipers when you change your clocks." After widespread acclaim, they have added **Quality Minutes** in which a helpful hint or tip, such as how to do a specific task on the PC, is offered. Pretty cool, huh?

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Beacon Bits

Quotations to cast rays of humanity across everyday business life

"He that will not apply new remedies must expect new evils." - Francis Bacon

"He who is learning without imagination has feet but no wings." - Stanley Goldstein

"I must follow the people. Am I not their leader?" - Benjamin Disraeli

"The only thing that can overcome a persuasive idea is a better idea." - Theodore S. Replier

"Life is a little like wrestling a gorilla. You don't quit when you're tired, you quit when the gorilla is tired." - Robert Strauss

Last Laughs:
New Inspirational Posters



You've seen those posters that portray idyllic concepts and happy people. Now imagine the depictions of these new sayings:

1. If you can stay calm while all around you is chaos, you probably haven't completely understood the seriousness of the situation.
2. A person who smiles in the face of adversity...probably has a scapegoat.
3. TEAMWORK means never having to take all the blame yourself.
4. Rome did not create a great empire by having meetings: they did it by killing all those who opposed them.
5. You pretend to work, and we'll pretend to pay you.
6. We put the "k" in "kwality."

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Seven Years in Business—Thank You!

As we approach our eighth year as entrepreneurs, we marvel at our fortune to have met and worked with so many extraordinary people. We are grateful for each and every reference, email and mention you have all so generously given. We will not let you down. We have learned profoundly, and seek to learn more. We do our best work every day, because there is no next job if corners were cut in the current one. We have become quite adept at biting our tongues, when warranted, and are pleased to inform you that we still have enough left to spew ideas. We love our jobs and cherish our clients and constituents. We thank you for your support and wish you all the absolute best in the new year.

- Leslie & Denise