ORCHESTRATE LLC

HIGH Notes

IN THIS ISSUE

Enzo Pellegrino's Annual Review Process

Alan Boal - Low Hanging Fruit Viewpoint

FALL 2013 ISSUE

BACK TO SCHOOL TIME

"Unless commitment is made, there are only promises and hopes; but no plans."
– Peter F. Drucker

From the Orchestrate Leader: Travis Rychnovsky

Committing to procedural discipline is much like making a New Year's resolution; it is a promise you make to yourself driven by a hope to bring your business to the next level. We have just seen the start of a new school year, which marks a new beginning. " A new beginning " is also the theme we have chosen for this edition of High Notes. Since procedural discipline (at least in the context of using a platform like ProcessComposer), is a less familiar concept to some business professionals, we will provide some insight in this newsletter into the commitment required and the necessary process using a golf analogy that many sports fans will relate to. We hope you enjoy High Notes' whimsical look at how golf might be compared to business practice.

Additionally, we would like to note that this edition's workflow template has been provided by Enzo Pellegrino of Texas Legacy Wealth Management. In a recent conversation, we asked Enzo how his firm decided to use ProcessComposer. His answer was having routine workflows driven by CRM keeps his team on the same page, and that their dedication to procedural discipline was already established long before they began using a different CRM in the firm. Enzo notes that focusing on procedural discipline using

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ALSO IN THIS ISSUE

From the Orchestrate Leader

Our Calendar

ProcessComposer Jam Session

Learning fron Golf Professionals

Mind Mapping Your Procedure Sets

OUR CALENDAR:

- **Dreamforce '13 San Francisco Nov 18-21**
- **Webinar Series (stay tuned)**
- **T3 Advisor Conference Anaheim Feb 10-12**

ProcessComposer JAM SESSION

JUST RELEASED:

- **A step in a process can be an email alert**
- **A step in a process can initiate another process**
- **Due dates can be configured to skip non-working days**

FUTURE RELEASES:

- **Cross-object field updates**
- **Custom reporting enhancements**
- **Recurring business process date option enhancements**
- **Chatter integration**
- **EMAIL us your ideas**

WHY ProcessComposer?

You plan your own time and activities with your CRM. In fact, everyone on your team does too, each their own way. Without a standardized discipline ensuring each person plans their own assigned steps properly, overall team efficiency suffers. ProcessComposer lets you define all of your standardized procedures and store them in one place. It knows who, what, and when to assign each step on a just-in-time basis. With ProcessComposer in control, the right person will do the right step at the right time, every time. Knowledge transfer from your star performers and training new stars will never be easier. We call it procedural orchestration in perfect harmony!

Stop Losing Time, Money and Opportunities.

Alan W. Boal – President of Idea Transfer Inc.

In the 1930's, the late Nobel Prize winner Ronald H. Coase asked: "Why are there firms?" Coase reasoned the cost of information determined the size and shape of firms. As costs rise, so does the confusion and complexity.

Coase later gave us the idea that firms and governments should lower the transaction costs between people who volunteer to exchange value for value. These two ideas seem simple today, but they were not simple before Coase described them.

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Mind Mapping for ProcessComposer

When using ProcessComposer to outline necessary procedural steps for commons tasks within your organization, it is first important to carefully analyze the overall process and the most efficient order to complete those tasks. Once this is completed, the step-by-step processes can be input into the workflow distribution engine in Salesforce.

The most efficient way to complete a process must be understood and outlined before it can be developed in ProcessComposer, and an intelligent way to establish the most efficient method is to use mind-mapping. When mind mapping, the ultimate goal is to list and arrange all of the procedural steps and sub-steps required to complete the process that you plan to document.

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BONUS FEATURE

Annual Review Process

(Compliments of Texas Legacy Wealth Management)

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Two Putting Under Pressure

Comparing a professional golfer to a business professional is not really a huge stretch. We also navigate a difficult course every day, counting upon our adept prowess in executing various procedures at the right time. In golf vernacular, what we in business practice is a team event that many would view as being a "scramble". This event in golf permits all players on a team to hit a ball and then they all proceed to hit their next shots from the same location where the best shot landed. Bad shots are all (hopefully) eliminated! While the business scramble shares some similarities, it is inarguably a bit different.

We have all experienced a client walking in the door on schedule, only to realize that there is an important part of the process that we forgot as

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STOP LOSING TIME, MONEY AND OPPORTUNITIES. *CONTINUED FROM PAGE 2:*

If you want to stop losing time, money and opportunities, remember that the average professional today spends eleven hours a week trying to find "stuff" – the information buried in your emails, client files and manila folders on the floor behind your desk.

If you want to lower information and transaction costs in your firm, the best way is to organize your low hanging fruit, and keep away from the low hanging power lines in all your electronic devices. We call this turning chaos into capital.

One technology with a lot of return on your investment and shock exposure is your CRM. If deployed properly, it will produce low hanging fruit – better case flow and cash flow.

Your CRM can also be a source of unexpected shocks. If used in an undisciplined fashion, it will produce regular and random jolts to your organization. We all know what happens when someone on your team does not do the rights things right – missing client deadlines is one example. For most firms, instead of aiding collaboration and cash flow, their CRM simply generates delays, blown fuses and "emotionally unsanitary events."

Your CRM procedures is only one of the places you discover low hanging fruit in your workflow or "valueflow." We define valueflow as the movement of clients, projects, tasks and knowledge along a visible path. If any of these are stuck in your path, process flow or pipeline, asking questions will always reveal the cause.

To get unstuck and find more opportunities – ask simple questions. Being simple does not mean being simple minded. In fact, simple means going back to basics. Kipling called his questions his six honest serving men.

> "I keep six honest serving men,
> (They taught me all I knew);
> Their names are What & Why &
> When & How & Where & Who."
>
> Rudyard Kipling
> **The Elephant's Child**, 1902

In tribute to Robert H. Coase, we can reduce information and transaction costs. We can turn chaos into capital with simple questions:

Where are we going,
Who will lead us,
When will we start working smarter together,
How can we improve our process,
What will we measure along the way, and
Why does this matter in the end?

From a valueflow perspective, your process can become more effective and more efficient. For every client, project and task, answer all six questions about them. You will see fewer log jams, and more movement with your case flow and cash flow.

MIND MAPPING FOR PROCESSCOMPOSER *CONTINUED FROM PAGE 2:*

You can do this the old-fashioned way, recording the steps on post-it notes and sticking them in sequential order on a white board or wall; moving them around to vary the order as required. Or, you can use mind mapping software program like MindGenius. The tool used doesn't really matter, provided you have something to help you brainstorm the steps required to define your procedural orchestrations. However, a software program certainly simplifies the process, making it extremely simple to develop the mind map and move branches around.

There are additional benefits to using mind mapping in your ProcessComposer setup as comments can be added to every branch of the mind map which allows you to provide further details required, such as outlining detail about resource assignment, timing, dependency, and conditional branching logic.

As you go through the defining process, you can either look at the big picture and see how each individual step comes together with the mind map, or you can look at individual components. With a highly visual look at procedures, use of mind mapping can better help you organize any procedure. Once you have completed your mind map, a software program like MindGenius allows you to export your ideas to Word, Excel, Powerpoint, PDF, or Visio. This becomes your working document from which to create your PCE definitions within ProcessComposer just as you have visualized the workflow during brainstorming.

Many people in an organization can play a role in the completion of any process, so these are the people that should be privy to the mind mapping session, as that brings all pieces of the puzzle together required for efficient procedures. Once procedures are thoroughly established and documented, the information can be entered into ProcessComposer to guide new and seasoned employees in completing processes per company standards.

BACK TO SCHOOL TIME

CONTINUED FROM PAGE 1:

a CRM ensures that all team members are on the same page, thanks to routine workflows. He is then able to focus his time on client relationship management, rather than assigning and supervising tasks associated with the most routine operations.

Idea Transfer Inc's Alan Boal has been guiding financial advisory firm management for decades. A key premise in his business coaching is that firms must get first things done first. Planning sets business priorities, but too often daily procedures are individually prioritized on a different basis. In his article, Alan explains how your first priority needs to be the low hanging fruit rather than the low hanging wires!

How do you get started with defining all your procedural steps that you want to author using ProcessComposer? One way to do it might be by leveraging mind mapping software. Look for a few tips in this newsletter in this regard.

TWO PUTTING UNDER PRESSURE *CONTINUED FROM PAGE 2:*

necessary for the client meeting. This "oops" factor that kicks in when this scenario occurs can create a bad impression with that client. It no longer matters that you have had hundreds of great interactions with that client; previous impressions fly out the window, and they lose confidence in your abilities. This business scramble might be different, but the result is the same as in golf; when something goes awry that little voice in your head might be shouting "fore" as team members use inconsistent approaches that can impact the positive end results.

The golf analogy also explains just how important pre-planning and use of procedural discipline is when it comes to ensuring that nothing is forgotten when preparing for an important client interaction in business. After all, the top golf teachers and sports psychologists suggest that success requires a disciplined pre-shot routine on every single shot.

Dr. Deborah Graham, PhD Licensed Counseling and Sports Psychologist to over 350 tour players, says that "no matter what the situation, always make your pre-shot routine your priority and you will be on your way to getting the most from your game". While it may be necessary, staying with a disciplined routine can be difficult, especially when coordinating "scrambling" efforts across a team, when members are all using a different approach.

These chaotic situations can be learned from, just as in golf. During every PGA tournament, for example, you can see both the player and the caddy consult their notes to see which approaches were successful, and which approaches failed when they encountered a similar situation previously. In business, such notes are too voluminous to carry and sort through at a given moment, but with an effective platform, efficient review of information can still be beneficial. Historically that was why post-it notes and spreadsheets were used as they can effectively guide team members in their pre-interaction routine. These methods may work, but they can

> "It takes hundreds of good golf shots to gain confidence, but only one bad one to lose it." - Jack Nicklaus

be fine-tuned, and greater efficiency helps with employee productivity and positive business development. A product like ProcessComposer can offer similar benefits to the post-it note documented procedures like in the past, but the concept is then taken to the next level.

Those of you that have been using ProcessComposer already know there is a better way to document your disciplined procedures and apply them just-in-time to get ready. But remember that a professional continuously updates and improves upon the situational notes to avoid that decisive bad shot, which means that refined procedures must be updated as procedures are altered internally.

If golf is not your usual fare, here are some important definitions that are also applicable to the golf vs procedural discipline analogy. While there is a lot about us we'd love for you to take seriously, we're leaning towards the lighter side with these tongue-in-cheek translations of a few golf terms as they might be applied to procedural discipline in business:

TEE – "Trust employees" to start it right.
FORE – **F**iring **O**rder **R**eally **E**ssential to get first procedures done first!
PUTT – **P**rocedures **U**se **T**ime **T**racking for success metrics.
CHIP – **C**arefully **H**oned **I**nteraction **P**rocess gets it close.
PAR – **P**rofessionally **A**nticipated **R**esult (of course!)

Ben Hogan once said, "The most important shot in golf is the next one" and that is definitely applicable for all of us in business as well.

Annual Review Process

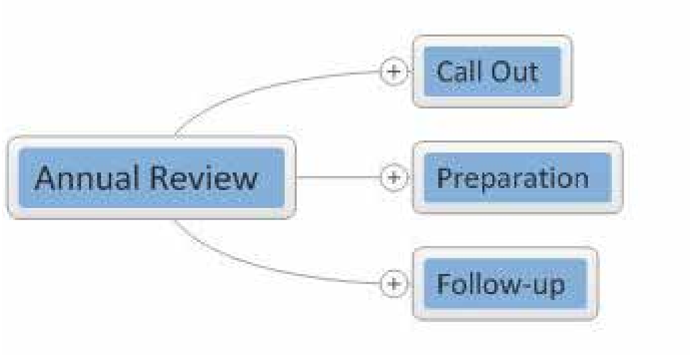
Thanks to Texas Legacy Wealth Management

One of the most sought after procedural set definitions for financial advisory firms is the annual review process. Enzo Pellegrino of Texas legacy Wealth Management has been passionate about embracing procedural discipline since the days that he was using Goldmine as his firm's CRM. His firm has evolved 10-12 custom procedural sets using ProcessComposer that are used extensively on a daily basis. He says that these allow him to be confident that all preparation and follow-up tasks are being done while he is focused on his client interactions.

He has agreed to share his annual review process definition with High Notes readers. It is somewhat challenging to outline within a newsletter format, so we also imbedded hyperlinks to illustrations that you will need to click on to view all components for this article in the proper context. We have used mind mapping software to illustrate this process.

TOP LEVEL VIEW

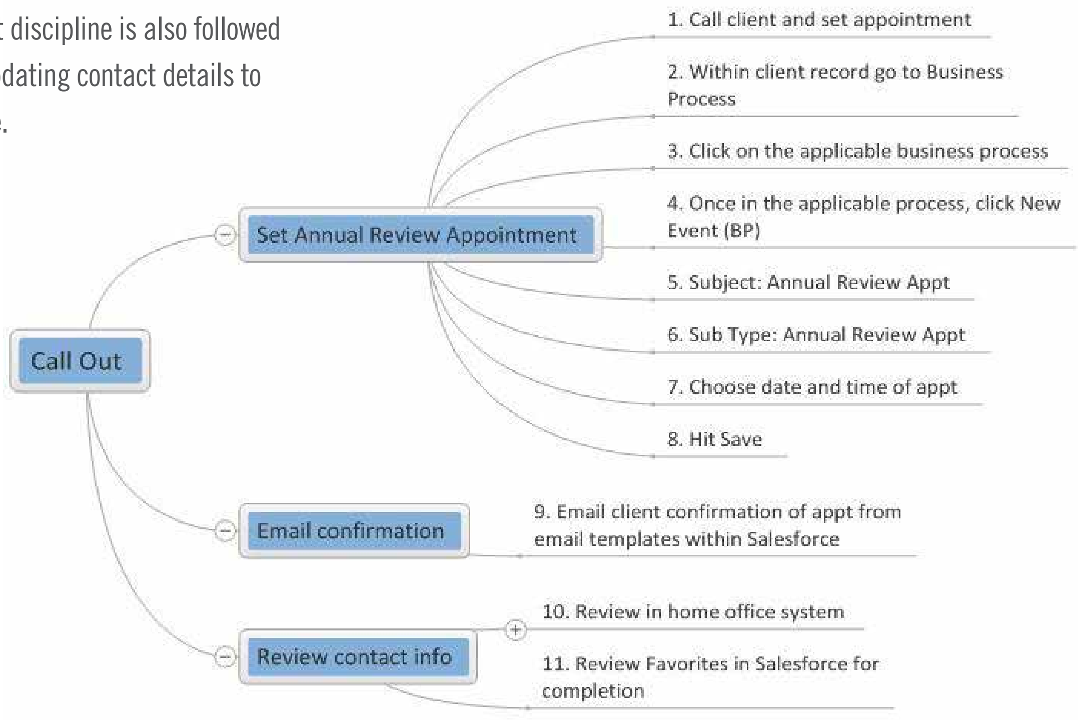
The entire annual review process generally has three component stages: scheduling the appointment; preparing for and conducting the review meeting; and completing the post-meeting follow-up steps.



ANNUAL REVIEW PROCESS *CONTINUED FROM PAGE 2:*

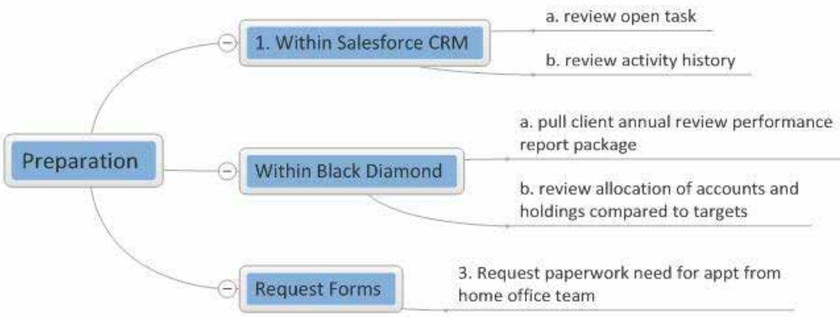
SCHEDULING STAGE

Getting the appointment kicks off the annual review process. Once confirmed by telephone, an email is sent to confirm appointment details. An excellent discipline is also followed of reviewing and updating contact details to complete this stage.



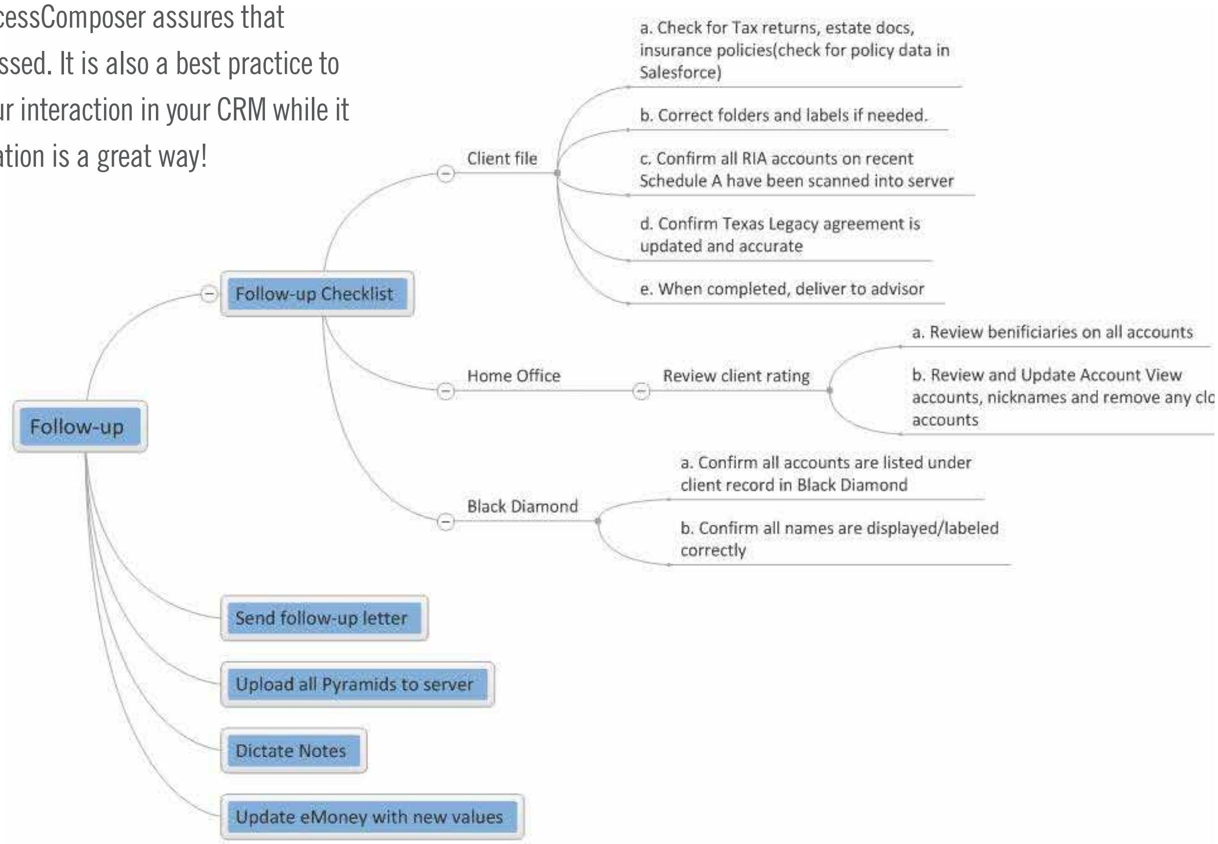
MEETING PREPARATION

We all have various system and form steps that help us get ready for a meeting. Here updating the CRM, creating performance reports and completing compliance steps with the home office are sure to be addressed.



FOLLOW-UP STAGE

As would be typical in any firm, the follow-up stage would have the most steps. A checklist built into ProcessComposer assures that nothing is missed. It is also a best practice to document your interaction in your CRM while it is fresh. Dictation is a great way!



Enzo and his team have developed excellent skills with Salesforce and ProcessComposer. On a limited basis, he would be willing to share his capabilities with other firms under a commercial arrangement. If you are interested, please let us know at Orchestrate and we would be happy to assess your readiness and do the introduction.