

Process Title: Making Breakfast before work

Process Objective: To have a nutritional breakfast in an organized manner on workdays.

Timetables:

Process time range: 20 minutes

Process Deadline: 6:20 AM

Process oversight responsibility: Yourself

Steps:

1. Day prior, develop menu and verify inventory.
2. Day prior, prepare coffee maker and set timer for 5:30 AM.
3. Day prior, set alarm to allow for time to wake up, shower and dress prior to 6:00 AM.
4. Shower, dress and enter the kitchen.
5. Pour coffee into cup and begin stimulus.
6. Slice 6 strawberries into quarters with a paring knife.
7. Pour 1 cup of Cheerios into a bowl.
8. Sprinkle strawberries on top of Cheerios.
9. Pour ½ cup of milk over the Cheerios.
10. Eat Cheerios, strawberries and milk using a teaspoon.
11. When finished, place bowl, spoon, paring knife and coffee cup into the dishwasher.
12. Leave a clean cup next to the coffeemaker with a love note for your spouse.
13. Fill traveler cup with coffee for the ride to work.
14. Brush teeth and start your commute with your traveler.

Metrics/Key Results:

1. Measurement: How many days per week did you eat breakfast?
Goals: Eat a nourishing breakfast every workday.
2. Measurement: How many days per week did you leave by 6:30?
Goals: Leave home by 6:30 every workday.

Review Plan/Correction of errors:

1. Short range:
 - a. Initial changes after one week.
2. Periodic schedule:
 - a. Seasonally review process and timetable for nutritional and timing adjustments

Company Logo

Updated: 9-1-20

Process Title: Pre-book Sales process (hypothetical)

Process Objective: To efficiently communicate history, opportunities and pertinent information to the customer and accurately place an order for the following spring.

Timetables:

Process time range: June-September

Process Deadline: September 30th.

Process oversight responsibility: Sales Manager

Steps:

1. Organize a list of past customers and potential target customers.
2. Create a list of historical orders and analyze order content, fulfillment, cancellations, shipping timing, credits, payment history, changes from prior years, etc.
3. Review upcoming crops for the following spring.
4. Prep work: Prepare a sales approach for the individual customer types in advance. Key points to prepare for and cover with the customer should include:
 - a. Understand their market position through research.
 - b. Know who the decision maker is and meet with them.
 - c. The sales approach express appreciation for their past business.
 - d. Resolve all past issues before going on to a new order.
 - e. Review their history (what worked and what did not.)
 - f. What is new and exciting, review your key differentiators.
 - g. Ask questions to fully understand their needs and any opportunities that exist. Listen and understand their motivators.
 - h. Review opportunities that exist for next year, share successes in similar businesses.
 - i. Review the specifics on the process with dates (order deadline, order confirmation, desired ship dates, inventory adjustments, cancellation process, delivery process, etc.)
 - j. Ask for and walk out with an order.
5. Set goals for each customer.
6. Organize an efficient schedule for meeting with the customers when required.
7. Organize a schedule and approach for communicating with customers that will not be in-person.
8. Review the plan with the Sales Manager.
9. Set appointments two weeks in advance with an expected meeting duration. Send supporting information and share the goals for the meeting including the desired outcome with the customer (pre-book, in-season orders.)
10. Confirm appointments within two days of the scheduled meeting.

DA LLC

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11. Be early for the appointment and analyze the customer's sales yard for sell through and any competitors' programs that are apparent. Understand the customer's overall strategy based on your observations.
12. Meet with the customer, follow your plan and ask for the order.
13. Enter the order into the system.
14. Review the order for accuracy.
15. Follow-up with a note of appreciation to the customer and what happens next.
16. Review the order report with the sales manager and compare to last year and new goals.

Metrics/Key Results: (hypothetical)

1. Orders vs. Last year
 - a. Last year's sales: \$1.5 M
 - b. This year's orders: \$1.7M
2. Orders vs. Sales goal.
 - a. Sales goal: \$1.6M
 - b. Orders: \$1.7M

Review plan/Correction of errors:

1. Meet with the Sales Manager by October 15th.
 - a. Review metrics.
 - b. What preparation for yourself or for the customer could improve?
 - c. What constructive feedback would help the company improve?
2. Create a plan for follow up and next year based on feedback.